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APRIL 20, 1934

**The Magazine for
MARKETING EXECUTIVES**

**Market Planning
Number**



**The National Survey
of Spending Power**



**Sales Possibilities
in the Leading City
Markets**

ONE DOLLAR



SHE'S a bride. Never before has she bothered her pretty head about what kind of flour makes the best cake, what vacuum cleaner is best, which dish-soap is easiest on the hands. Mother always attended to those things.

But now the bride is On her Own. She's a new customer in the nation's market-place . . . a new customer for *your* product. But, unfortunately, she doesn't *know* your product. She never saw your trademark. If she did, she wasn't interested . . . then.

For you stopped advertising three years ago. And three years might as well be three centuries . . . so quickly do markets change.

The money you spent on advertising three years ago . . . or two . . . or one . . . *will not sell any merchandise today.* Too many new customers come into the market; too many old customers forget you. As far as consumers are concerned, the Corridors of Time *started only yesterday.*

The manufacturer who would maintain his hard-won position *must* continue to advertise. Those who would *regain* a lost prestige must *start* advertising once more, and *keep* at it.

To both groups the 27 Hearst newspapers represented by the Rodney E. Boone Organization afford powerful weapons in 14 of America's foremost market-areas . . . not alone to maintain public memory, but also to exert the persistent, *compelling pressure upon retailers* that forces goods to be sold.



*The Corridors of Time
Started Yesterday*

CALL THE



BOONE MAN

RODNEY E. BOONE ORGANIZATION A UNIT OF HEARST ADVERTISING SERVICE

CHICAGO
DETROIT

CLEVELAND
BOSTON

NEW YORK
PHILADELPHIA
ROCHESTER

ATLANTA
SAN FRANCISCO

LOS ANGELES
SEATTLE

THE BOONE MAN REPRESENTS 27 HEARST NEWSPAPERS

DAILY

SUNDAY

New York Journal	Boston American	Atlanta Georgian	Boston Advertiser	Rochester American	Baltimore American
Albany Times-Union	Baltimore News	Chicago American	Albany Times-Union	Detroit Times	Washington Herald
Syracuse Journal	Washington Herald	Detroit Times	Syracuse American	Omaha Bee-News	Atlanta American
Rochester Journal	Washington Times	Omaha Bee-News	Los Angeles Examiner	San Francisco Examiner	Seattle Post-Intelligencer
Los Angeles Examiner	San Francisco Examiner	Seattle Post-Intelligencer			

The National Survey of Spending Power

*As seen by the Editors of SALES MANAGEMENT for the year
beginning January 1, 1934*

Spendable money income for 1933 jumped from 41.76 billions in 1932 to 52.15 billions, but the gain in retail sales was fractional—from 28.65 billions to 29.46 billions. On a per capita basis spendable money income increased from \$335 in 1932 to \$415 in 1933, and retail sales gained \$5 (\$230 in 1932 and \$235 in 1933).

This seeming lag in retail sales recovery is explained by the fact that retail prices during the first six months of 1933 reached their lowest level of the depression, and retail purchases were held down to slight proportions during the bank holiday.

SALES MANAGEMENT's original and exclusive estimates of spendable money income and retail sales are shown for each state in the Union in the tables following. The twenty columns of factual information in the tables give a comprehensive state picture of where people live, how much they have to spend, how they make their money, how their situation today compares with a year ago—as measured by such indices as changes in employment, changes in payrolls, purchases of passenger cars in the four price classifications, sales of trucks, sales of radio sets, etc.

The sources of the figures in each column are as follows:

Population

Estimates of the Bureau of the Census as of July 1, 1933.

Passenger Car Sales

These are the total sales of new passenger cars in the calendar year of 1933, as compiled by R. L. Polk & Company and broken down into four major price classes; percentage gains of 1933 over 1932, and sales of new trucks also are compilations of R. L. Polk & Company.

Total Farm Net Income

These are the preliminary estimates, released to SALES MANAGEMENT by the Bureau of Agricultural Economics of the Department of Agriculture. They are made as of January 1, 1934.

Spendable Money Income

These are the annual estimates of the SALES MANAGEMENT statistical staff, and include spendable money income for 1933 from all sources such as wages, salaries, fees and commissions of every sort, business profits and all miscel-

laneous items of income. The individual's income is before taxes are paid.

The phrase "money income" means income received in dollars as distinguished from service compensation of an individual or members of a family for which there is no money consideration. It does not take into account either inventory gains or losses, or products used on farms for farm household, feed, seed and waste.

For further details on methods used in determining national income, and retail sales and apportioning them by states, see pages 354, 355 of *Survey of Spending Power*, the April 10, 1933, issue of SALES MANAGEMENT

Retail Sales

These figures are based on SALES MANAGEMENT studies of bank debits, dividends, wages, automobile sales, food sales, clothing sales, drug sales, furniture sales, etc. These preliminary estimates were then checked with experts of the Department of Commerce in Washington.

Income Tax Returns

These cover the calendar year of 1931 and are the most recent figures available. They were released by the Government on February 1, 1934. Figures show gross incomes reported by those who filed Federal income tax returns in that year, including both corporations and individuals.

Value Added by Manufacture

These 1931 figures are also the latest available and are official figures of the Bureau of the Census.

Changes in Employment and Payrolls

All figures shown in these columns are increases, except a few preceded by a minus sign. They were taken from official records of the Bureau of Labor Statistics of the Department of Labor, and cover changes in employment and payrolls in identical manufacturing companies for the month of February, 1934, and 1933.

Radio Set Sales

The three columns of information about radio set sales are supplied through the courtesy of the Columbia Broadcasting System, Inc., and are taken from a March, 1934, report put out by that organization called "The Flood Hits the Spillways."

1934 Survey of Spendable Money

National income jumps ten billion dollars in one year;
retail sales show slight gains; farm income and auto
sales register large increases.

STATES	Population (000 omitted)	% of the U. S.	PASSENGER CAR SALES 1933					Truck Sales 1933	Total Farm Net Income 1933 (000 omitted)	Spendable Money Income 1933 (000 omitted)
			Under \$650	\$651-\$850	\$851-\$1250	Over \$1,250	% gain of all cars 1933 over 1932			
Alabama.....	2,697	2.1480	12,487	1,439	471	117	73.3	4,054	92,931	447,476
Arizona.....	453	.3604	2,668	687	234	56	43.3	1,086	22,035	132,118
Arkansas.....	1,872	1.4994	10,244	1,068	246	69	63.9	3,638	87,635	336,604
California.....	6,062	4.8230	69,554	17,973	7,339	3,202	38.7	13,788	297,100	3,447,214
Colorado.....	1,052	.8370	8,630	2,068	735	306	14.5	2,488	72,831	432,245
Connecticut.....	1,646	1.3100	15,242	5,896	2,114	961	37.8	4,246	30,918	667,715
Delaware.....	241	.1917	2,945	780	269	125	29.4	828	10,471	119,423
Dist. of Columbia.....	495	.3938	9,560	3,182	1,163	468	8.4	1,362	.....	384,974
Florida.....	1,554	1.2364	14,784	3,040	751	348	28.6	4,186	49,465	366,103
Georgia.....	2,911	2.3160	20,035	2,708	1,033	343	70.4	5,200	115,351	566,723
Idaho.....	447	.3556	2,744	545	133	41	64.2	1,545	53,021	106,089
Illinois.....	7,826	6.2265	57,094	18,941	6,469	3,056	37.5	11,764	251,981	4,120,877
Indiana.....	3,297	2.6184	29,645	7,594	2,281	656	37.6	8,121	156,131	1,050,844
Iowa.....	2,482	1.9747	21,895	4,048	1,027	316	39.8	5,449	358,010	913,642
Kansas.....	1,900	1.5117	19,180	3,763	1,047	248	63.8	4,292	169,283	637,314
Kentucky.....	2,646	2.1068	15,898	3,271	836	311	44.2	4,195	107,804	490,695
Louisiana.....	2,153	1.7130	13,758	1,782	522	238	53.4	2,882	63,569	441,845
Maine.....	802	.6381	6,254	1,903	678	239	14.7	2,614	43,792	222,701
Maryland.....	1,663	1.3231	14,400	3,971	1,301	521	11.6	3,818	45,650	604,414
Massachusetts.....	4,313	3.4315	42,296	13,445	5,188	2,317	24.5	9,511	38,418	2,553,485
Michigan.....	5,043	4.0123	62,958	17,055	4,030	1,638	42.4	9,085	141,922	1,987,649
Minnesota.....	2,594	2.0638	23,546	4,638	1,943	702	25.2	5,722	222,867	915,867
Mississippi.....	2,047	1.6286	9,537	853	186	52	80.4	2,752	90,233	334,914
Missouri.....	3,668	2.9183	34,246	8,246	2,325	956	17.3	8,535	199,299	1,266,257
Montana.....	538	.4280	4,367	1,237	382	90	47.6	2,055	53,962	156,000
Nebraska.....	1,392	1.1075	13,312	2,188	694	198	45.6	2,713	191,764	543,152
Nevada.....	93	.0740	974	235	84	35	.2	233	7,186	37,695
New Hampshire.....	469	.3731	4,733	1,273	454	137	20.7	1,783	15,997	106,549
New Jersey.....	4,193	3.3360	35,569	13,771	4,876	2,222	16.8	7,401	51,144	2,352,704
New Mexico.....	434	.3453	2,936	568	166	48	59.2	1,395	25,798	84,075
New York.....	12,965	10.3152	106,749	40,971	17,161	7,881	18.5	20,200	206,657	10,156,739
North Carolina.....	3,275	2.6057	24,646	3,489	805	251	91.0	6,597	161,752	649,963
North Dakota.....	687	.5466	4,371	699	165	28	32.9	1,107	82,351	203,330
Ohio.....	6,798	5.4088	73,218	20,570	5,231	2,194	55.8	11,150	183,962	2,623,301
Oklahoma.....	2,459	1.9564	22,809	4,352	1,334	419	69.8	4,941	126,885	635,475
Oregon.....	983	.7821	7,597	1,781	547	198	56.0	2,488	62,913	404,700
Pennsylvania.....	9,787	7.7867	81,699	26,626	9,448	3,652	27.4	19,991	190,984	4,626,770
Rhode Island.....	702	.5585	7,425	2,178	816	330	35.1	1,598	5,368	266,384
South Carolina.....	1,748	1.3907	12,670	1,536	307	78	114.2	2,604	74,092	385,120
South Dakota.....	702	.5585	3,717	853	225	54	21.2	996	65,939	218,971
Tennessee.....	2,664	2.1195	16,884	2,093	684	239	70.0	3,623	104,468	551,494
Texas.....	6,023	4.7920	68,056	8,896	2,646	849	80.4	13,889	338,409	1,972,533
Utah.....	518	.4121	3,410	740	458	96	72.4	1,568	26,975	158,877
Vermont.....	361	.2872	2,574	810	265	125	-7.1	1,311	34,244	164,420
Virginia.....	2,441	1.9421	17,599	3,394	866	319	6.6	5,669	98,711	559,435
Washington.....	1,599	1.2722	11,822	3,495	1,022	294	45.0	4,000	87,414	697,180
West Virginia.....	1,774	1.4114	11,464	2,889	710	243	50.8	2,988	42,415	398,582
Wisconsin.....	2,992	2.3805	19,543	6,175	1,897	693	11.4	5,411	214,582	1,133,579
Wyoming.....	231	.1838	2,192	546	164	43	24.4	937	27,503	81,607
TOTAL.....	125,694	.....	1,061,938	280,119	93,728	38,002	36.2	245,869	5,201,970	52,157,843

Income and Other Market Data

For sources of all figures used in these tables see page 357. For full explanation of sources of data on city markets, see notes and comment on pages 361 and 362.

% of the U. S. Total	U. S. Retail Sales 1933 (000 omitted)	% of the U. S. Total	Income Tax Returns 1931 in dollars (000 omitted)	Value added by manufacture 1931 (000 omitted)	% change in employment Feb. '34 over '33	% change in payrolls Feb. '34 over '33	Radio Set Sales 1933	Total No. of Radios Jan. 1, 1934	% of Homes owning radios	STATES
.6579	264,529	.9658	80,005	151,050	37.0	77.2	11,900	114,035	19.3	Alabama
.2533	100,446	.3410	36,006	25,121	21.5	18.0	2,650	34,917	32.9	Arizona
.6454	215,302	.7308	39,867	44,452	6.6	17.3	7,300	82,696	18.9	Arkansas
6.6090	2,014,504	6.8382	1,215,977	791,123	12.0	13.9	61,400	1,129,105	70.1	California
.8267	259,231	.8800	119,651	76,338	23.1	22.0	7,900	164,559	61.6	Colorado
1.2600	506,907	1.7207	390,884	470,568	25.7	41.2	22,750	306,929	79.0	Connecticut
.2269	60,289	.2047	76,651	44,944	11.1	24.1	2,250	45,664	77.3	Delaware
.7380	238,817	.8107	236,239	49,933	- 8.9	- 1.2	7,400	118,740	94.6	Dist. of Columbia
.7019	269,093	.9134	137,802	88,763	29.6	41.0	13,300	151,328	40.2	Florida
1.0670	377,580	1.2817	131,367	182,981	37.7	62.4	25,650	156,593	24.0	Georgia
.2033	85,382	.2898	21,858	22,952	16.7	25.5	4,100	49,972	46.3	Idaho
7.9010	2,212,603	7.5107	1,484,519	1,738,812	31.6	38.6	60,450	1,420,445	73.6	Illinois
2.0150	738,548	2.5070	250,547	637,233	27.8	39.7	31,100	509,190	60.4	Indiana
1.7520	498,940	1.6937	149,349	204,804	15.0	17.9	16,350	387,798	61.0	Iowa
1.2220	399,445	1.3559	114,272	124,133	-17.2	-25.6	7,250	250,848	51.5	Kansas
.9407	330,634	1.1223	130,056	145,984	25.0	49.6	18,300	187,817	30.8	Kentucky
.8471	269,970	.9164	137,074	131,113	20.6	37.3	20,500	152,335	31.4	Louisiana
.4269	167,359	.6360	91,898	117,213	26.3	40.9	7,950	119,268	60.3	Maine
1.1590	409,812	1.3911	338,780	304,189	41.4	65.1	24,450	262,599	68.2	Maryland
4.6950	1,304,051	4.4266	984,875	1,142,357	- 5.2	- .5	55,000	844,552	82.7	Massachusetts
3.6110	1,119,508	3.8001	622,253	1,252,096	43.4	66.6	37,150	773,779	65.5	Michigan
1.7560	572,801	1.9444	265,842	261,747	21.8	25.9	16,250	382,836	63.1	Minnesota
.6421	212,395	.7210	36,586	46,086	37.5	52.6	6,200	53,657	11.4	Mississippi
2.4260	856,779	2.9083	418,962	486,535	16.6	26.6	35,400	602,698	64.2	Missouri
.2991	105,790	.3591	40,949	29,955	28.6	34.5	3,600	65,142	47.8	Montana
1.0410	309,266	1.0498	106,469	79,157	15.7	10.7	8,200	211,959	61.8	Nebraska
.0723	24,562	.0834	17,157	3,835	36.0	30.0	1,000	13,095	51.4	Nevada
.3193	111,278	.3777	56,849	97,502	21.2	34.1	6,250	80,472	67.4	New Hampshire
4.5110	1,230,699	4.1776	959,213	1,160,032	27.1	33.5	39,500	858,365	87.1	New Jersey
.1612	58,609	.1989	21,915	6,298	15.5	20.2	1,250	20,098	20.4	New Mexico
19.4700	4,776,440	16.2137	4,064,223	3,413,843	20.3	30.4	167,900	2,668,623	84.6	New York
1.2460	414,094	1.4056	124,081	621,057	37.5	66.0	22,250	150,309	23.3	North Carolina
.3697	129,306	.4389	23,427	11,921	32.4	27.6	3,650	63,396	57.5	North Dakota
5.4130	1,599,078	5.4291	870,572	1,576,176	25.9	45.4	63,250	1,199,392	70.6	Ohio
1.2180	415,842	1.4116	126,202	68,373	29.1	26.4	8,500	178,602	31.7	Oklahoma
.7759	275,694	.9358	89,250	110,993	26.0	34.0	11,800	172,148	64.6	Oregon
9.2540	2,321,850	7.8815	1,530,911	1,991,215	17.4	35.3	109,350	1,672,477	74.8	Pennsylvania
.5145	195,351	.6631	138,186	211,322	13.5	24.4	7,000	142,760	66.3	Rhode Island
.7000	191,330	.6495	44,263	109,349	30.6	76.5	10,900	65,589	17.9	South Carolina
1.0770	147,559	.5009	27,251	18,265	20.0	16.9	2,350	90,095	55.9	South Dakota
1.0570	366,758	1.2517	134,280	212,460	23.2	41.1	18,900	202,662	33.7	Tennessee
3.7820	1,130,249	3.6366	438,555	272,935	52.1	60.2	55,600	490,404	35.5	Texas
.3048	108,966	.3699	40,256	32,188	- 2.8	12.1	7,650	79,382	66.5	Utah
.3152	98,498	.3343	35,549	43,186	11.1	16.1	4,000	56,483	63.3	Vermont
1.0730	384,738	1.3060	161,132	352,683	7.8	18.0	24,200	207,507	39.2	Virginia
1.3370	468,932	1.5918	210,289	195,086	26.2	30.8	16,200	265,593	62.7	Washington
.7641	277,753	.9428	101,231	162,866	46.2	83.0	12,450	166,692	44.6	West Virginia
2.1730	736,973	2.5017	320,543	530,097	- 8.6	9.9	26,250	477,315	67.0	Wisconsin
.1565	52,931	.1797	21,443	15,488	- 1.0	- 5.6	1,650	27,222	47.9	Wyoming
.....	29,459,471	.....	17,217,284	19,886,789	.....	.....	1,138,600	17,946,162	60.0	TOTAL



But Mother,
I buy Bobbie's
vegetables already
strained!"

**Younger Housewives
NEW PROSPECTS**

NEW buyers because Tower readers are younger. Average age 25, 74% housewife. Buying habits forming. Easier to sell than older women with settled buying habits. Circulation 100% voluntary—concentrated in 1269 tested markets where 75% of all retail business is done. Is Tower on your 1934 list to reach these responsive NEW users?*

*Age when the average American mother has her second child—Metropolitan Life Insurance Study.

THE younger housewife has a sound, new approach to child care. When *she* was a baby, her mother tediously cooked and strained vegetables herself. But Bobbie's vegetables come in a can, cooked, strained and bearing the approval of the A.M.A. Quicker to use. Efficient. Accurate. The younger housewife buys a *new* kind of magazine. TOWER RADIO, NEW MOVIE, SERENADE, MYSTERY or HOME. Fiction and features by famous authors in a lively-new tempo, quick-moving like her own daily life. Buys them in a *new* way, over the counters of Woolworth Stores and newsstands, every copy for cash. She is Tower's younger housewife reader, so valuable a prospect that, since December, 1929, the first on-sale date, big accounts have used over \$3,800,000 in Tower advertising!

TOWER MAGAZINES INC.

NEW YORK • CHICAGO • SAN FRANCISCO • HOLLYWOOD

SALES MANAGEMENT

Sales Possibilities in Leading City Markets

AT the suggestion of a representative group of our subscribers, we have dropped the plan followed in previous statistical numbers of listing data by *counties*, and for these columns have substituted a breakdown by leading cities and their local retail areas.

The trading areas used in the city information which follows are the areas determined by the Marketing Department of Batten, Barton, Durstine & Osborn, and were released by special arrangement to SALES MANAGEMENT through the courtesy of Mr. Chester E. Haring, director of marketing.

The BBDO areas are based on the circulation of daily newspapers. Ten years ago, when the agency for the first time approached this problem of determining trading areas, it was reasoned that the spread of the circulations of daily newspapers completely reflected the complex interests and relationships between smaller places and trading centers. Confirmation of the correctness of their theory (which has been followed in later revisions) is to be found in the study, "The Metropolitan Community," published in 1932 as part of the Hoover committee's report on "Recent Social Trends." The report says, "Since the daily press depends largely upon local advertising and since advertisers are concerned with the nature of the circulation, as well as its volume, the areas covered by a city's leading newspapers tend to coincide closely with the retail trading area of the city."

Mr. Haring says, "When it was decided to base our study of marketing areas on daily newspaper circulation, it was also decided to base the mapping of these areas on county lines. Although it is obvious that trade is influenced by county lines no more than it is by state lines, or other political boundaries, counties are the smallest units for which most statistics are compiled. Necessity dictated their use."

The BBDO trading areas as modified and brought up-to-date are broken down into major areas (wholesale) and local retail areas. In the city reports that follow, the counties for which the increase in new passenger car sales, 1933 over 1932, are those included in the BBDO *local retail areas*.

All areas which follow are those of BBDO, with the exception of Akron, Newark, Bridgeport and St. Petersburg, as determined by SALES MANAGEMENT.

APRIL 20, 1934

Population

All population figures given are taken from the official 1930 Census which differs slightly from the 1933 estimates as used in the preceding tables of state figures.

Retail Outlets

These are the total of all retail outlets as determined by the 1930 Census of Distribution. No accurate data are available covering the changes which have taken place in depression years.

Income Tax Returns

These are the latest figures available (released February 15, 1934), but cover returns for the calendar year 1931.

Bank Debits

These are consolidated January-February figures and are compiled by SALES MANAGEMENT from official releases of the Federal Reserve Bank.

Department Store Sales

Figures for the months of January and February are taken from Federal Reserve reports. In certain cities for which Federal Reserve reports were not available, we have used estimates of March sales as gathered for SALES MANAGEMENT by investigators of the Ross Federal Service, Inc.

Factory Employment and Payrolls

The United States Bureau of Labor Statistics compiles figures on cities of 500,000 or more. Percentages given for other cities are estimates secured by SALES MANAGEMENT by investigators of Ross Federal Service, Inc., from Chambers of Commerce, State Industrial Commissions, research departments of state universities, etc.

Counties in Areas and Percentage of Increase in New Passenger Car Sales

The counties listed are those which constitute the trading area of the city as determined by BBDO, and the percentage figures of increases in new passenger car sales, 1933 over 1932, were compiled exclusively for SALES MANAGEMENT by R. L. Polk & Company, Detroit, Michigan.

Current Business Situation

In more than fifty cities research men of the Ross Federal Service made a careful investigation late in March and early in April and furnished to SALES MANAGEMENT exclusive detailed reports of five pages or more. The text matter under certain cities is an abstract from these reports. The Ross men interviewed food distributors, druggists, department store executives, motion picture exhibitors, automobile sales agencies, jobbers and wholesalers, factory plant executives, municipal building commissioners, chambers of commerce, newspaper executives, bankers, etc., to get this information. Time and other limitations made it impossible to get a report on current business conditions from some cities.

SALES MANAGEMENT is also indebted to many newspaper executives and secretaries of chambers of commerce for supplementary information supplied to us direct.

Suggestions for Using These Figures

The following uses are suggested:

To determine where business is best now and where it is improving most rapidly.

Allocating Advertising by Districts.

Allocating Sales Promotions by Districts.

Determining Market Potentials.

Setting Sales Quotas.

Checking Media Circulations Against Income and Sales.

Checking Salesmen's Results Against Potentialities.

Furnishing Spending Power Data to Dealers.

Determining Markets for Intensive Cultivation.

Determining City Markets for Testing.

Servicing Agency Accounts.

Defining Sales Territories.

Appointing Exclusive Distributors.

Many sales and advertising executives have found that the combination of population plus retail outlets, plus income tax returns, gives a reliable yardstick of the potentialities of any market in comparison with other markets. Gross figures are not recommended for this purpose, but percentage of the U. S. A. tells a graphic story. The following illustration shows how this information may be used:

	City A Retail Area	City B Retail Area
% U. S. A. Population .....	.377	.370
% U. S. A. Retail Outlets .....	.499	.284
% U. S. A. Income Tax Returns..	.581	.381
	1.457	1.035

The population in the retail trading area of both cities is practically identical, but the increased number of retail outlets and income tax returns in City A shows that more people have money to spend, and consequently more stores are in operation to take care of their demand, and the total "credits" of 1.457 for City A against 1.035 for City B show that City A has a retail sales capacity approximately 41% greater than City B. Whether that capacity can be realized currently depends to a large extent on the business situation as it exists today. This is shown by the special reports and the facts on employment, payrolls, department store sales and bank debits presented on following pages.

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Sales Possibilities in Leading City		Erie, Pa.	394
Markets	361	Evansville, Ind.	370
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Passenger Car Sales, Radio Set		Grand Rapids, Mich.	379
Sales, Etc.	358	Harrisburg, Pa.	394
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iliations	379	Houston, Tex.	401
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Albany, N. Y.		Knoxville, Tenn.	400
Altoona, Pa.		Little Rock, Ark.	363
Atlanta, Ga.		Los Angeles, Cal.	364
Baltimore, Md.		Long Beach, Cal.	374
Birmingham, Ala.		Los Angeles, Cal.	400
Bridgeport, Conn.	366	Madison, Wis.	368
Boston, Mass.	376	Minneapolis, Minn.	383
Buffalo, N. Y.	388	Nashville, Tenn.	400
Charleston, S. C.		Newark, N. J.	384
Charlotte, N. C.		New Haven, Conn.	366
Chicago, Ill.		New Orleans, La.	375
Cincinnati, O.	392	New York, N. Y.	386
Cleveland, O.	398	Oakland, Cal.	363
Columbia, S. C.	398	Oklahoma City, Okla.	392
Columbus, O.	390	Omaha, Neb.	384
Dallas, Tex.	400	Peoria, Ill.	370
Dayton, O.	390	Philadelphia, Pa.	394
Denver, Colo.	366	Phoenix, Ariz.	363
Des Moines, Ia.	374	Pittsburgh, Pa.	396
Detroit, Mich.	376	Portland, Me.	375
Duluth, Minn.	379	Portland, Ore.	394
		Providence, R. I.	398
		Raleigh, N. C.	388
		Richmond, Va.	402
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		Sacramento, Cal.	364
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		San Diego, Cal.	363
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		Wilmington, Del.	367
		Winston-Salem, N. C.	388
		Worcester, Mass.	376
		Youngstown, O.	390

Birmingham, Ala.

	City	Retail Area
Population	259,678	1,443,898
% U. S. A. ....	.212	1.176
Retail Outlets	2,799	11,598
% U. S. A. ....	.181	.749
Income Tax Returns.....	8,194	12,744
% U. S. A. ....	.241	.375
Bank Debits (Jan.-Feb.).....	increased	36.6%
Department Store Sales (Feb.).....	increased	44.5%
Payrolls (March)	increased	40.0%

Counties in area and % increase in new passenger car sales, '33 over '32—ALABAMA: Bibb, 102.3; Blount, 53.6; Calhoun, 70.1; Chilton, 53.6; Clay, 53.7; Cleburne, -11.5; Colbert, 193.2; Coosa, 137.5; Cullman, 54.8; Fayette, 58.3; Franklin, 79.3; Greene, -25.6; Hale, 81.6; Jefferson, 69.4; Lamar, 128.1; Lauderdale, 153.6; Lawrence, 185.0; Limestone, 168.4; Madison, 172.3; Marengo, 94.2; Marion, 19.6; Marshall, 86.1; Morgan, 55.1; Perry, 13.8; Pickens, 58.1; St. Clair, 46.0; Shelby, 55.7; Talladega, 155.1; Tallapoosa, 258.6; Tuscaloosa, 47.3; Walker, 95.0; Wilcox, 71.4; Winston, 35.9.

Current Business Conditions

The Birmingham section has shown a tremendous improvement through natural courses of recovery and by reason of large distributions of government money in its immediate trading area. Alabama cotton farmers, for example, received nearly \$10,000,000 last year in direct payments for their participation in the crop reduction program.

Large industrial plants, such as the Tennessee Coal & Iron, Sloss-Sheffield, and Republic Steel Corporation, are operating at better than twice the level of a year ago, but some of their executives fear that the cutting down of work hours and the pay advances will boost prices to such an extent that the demand in the next few months may be curtailed.

Building activities are making good percentage gains, but are still very low as compared with pre-depression figures.

The greatest advances have been made in general mercantile, automobile, agricultural, motion picture and cotton mill businesses.

The Ross investigator found that March business in the 235 stores of the Hill Grocery Company was more than 10% above last year; that the 125 A & P stores had boosted their business by 10% to 15%; the 100 stores of the Associated Grocery Company had a 25% increase, etc.

A group of selected drug stores showed increases ranging from 10% to 30%, while department stores, since the first of the year, have shown steady increases in excess of 40% above the 1932 levels. Three department stores contacted by Ross had March increases ranging from 75% to 150%.

Birmingham people are spending more and more money for amusements, with motion picture theatres reporting attendance increases ranging from 25% to 53%, and all automobile dealers pointing to extraordinary gains, including 100% for the Ford dealer; 35%, Chevrolet; 50%, Buick; 150%, Hudson; 60%, Studebaker; 300%, Packard.

The public utilities are finding business much better, and have been forced to increase their staffs. Thirteen hundred and seventy-four persons are currently employed by the Birmingham Electric Company—a 13% increase in employment over last year, and an 18% increase in payrolls.

The Jefferson County Agricultural Agent estimates that currently there is a 75% increase in agricultural income in the Birmingham area.

Cullman, Gadsden, Albertville, Anniston, Talladega, Sylacauga, Columbiana, Alexander City, Clanton, Tuscaloosa, Jasper, Fayette and Haleyville are the more important tributary cities and because of the increased farm purchasing power and the various government projects, business conditions are better than in several years past.

Phoenix, Ariz.

	City	Retail Area
Population	48,118	295,941
% U. S. A. ....	.039	.241
Retail Outlets	937	3,330
% U. S. A. ....	.060	.215
Income Tax Returns.....	2,911	5,555
% U. S. A. ....	.086	.164
Bank Debits (Jan. Feb.).....	increased	34.0%

Counties in area and % increase in new passenger car sales, '33 over '32—ARIZONA: Apache, 30.2; Coconino, 79.1; Gila, 102.6; Graham, 196.2; Maricopa, 44.8; Navajo, 90.8; Pinal, 41.8; Yavapai, 22.8.

Little Rock, Ark.

	City	Retail Area
Population	81,679	1,022,524
% U. S. A. ....	.067	.833
Retail Outlets	1,040	9,739
% U. S. A. ....	.067	.629
Income Tax Returns.....	2,766	6,569
% U. S. A. ....	.081	.194

Counties in area and % increase in new passenger car sales, '33 over '32—ARKANSAS: Arkansas, 127.5; Ashley, 112.0; Baxter, -9.1; Boone, 65.1; Bradley, 131.3; Calhoun, -13.0; Chicot, 4.7; Clark, 58.7; Cleburne, 188.9; Cleveland, 86.7; Conway, 50.0; Dallas, 97.1; Desha, 22.7; Drew, 85.7; Faulkner, 26.9; Fulton, -33.3; Garland, 36.2; Grant, 4.5; Hot Spring, 49.1; Independence, 36.1; Izard, 58.3; Jackson, 69.9; Jefferson, 60.8; Johnson, 19.0; Lawrence, 90.9; Lincoln, 36.0; Lonoke, 106.1; Marion, 100.0; Montgomery, 525.0; Nevada, 57.1; Newton, 260.0; Ouachita, 71.1; Perry, 107.7; Pike, 18.2; Pope, 43.5; Prairie, 50.0; Pulaski, 60.7; Randolph, 35.1; Saline, 104.2; Searcy, 26.7; Sharp, 83.3; Stone, -12.5; Van Buren, 66.7; White, 23.3; Woodruff, 26.1; Yell, 6.7.

San Francisco, Cal. Oakland, Cal.

	City	Retail Area
Population	634,394	1,930,182
% U. S. A. ....	.517	1.572
Retail Outlets	10,849	31,362
% U. S. A. ....	.700	2.024
Income Tax Returns.....	55,173	112,048
% U. S. A.	1.626	3.301
Bank Debits (Jan.-Feb.).....	increased	12.5%
Department Store Sales (Jan.).....	increased	19.8%
Factory Employment (Jan.).....	increased	16.7%
Factory Payrolls (Jan.).....	increased	21.7%

(All figures under city columns above are for San Francisco only.)

Counties in area and % increase in new passenger car sales, '33 over '32—CALIFORNIA: Alameda, 27.2; Alpine, -33.3; Amador, 40.9; Contra Costa, 50.7; Del Norte, 169.3; Humboldt, 61.0; Lake, 5.7; Marin, 35.2; Mariposa, 27.1; Mendocino, 22.7; Merced, 62.7; Mono, 66.7; Monterey, 48.7; Napa, 5.2; San Benito, 38.9; San Francisco, 21.9; San Luis Obispo, 39.5; San Mateo, 32.8; Santa Clara, 24.4; Santa Cruz, 25.4; Siskiyou, 35.3; Solano, 5.4; Sonoma, 26.1; Stanislaus, 49.0; Tuolumne, 38.9.

Current Business Situation

March was the sixth consecutive month in which all twelve of the industrial groups reporting to the State Labor Commissioner showed increases in the number of workers employed as compared with the previous year. Payrolls of industrial establishments for the month were 24% greater than last year and the number of workers increased 16.9%.

According to the Research Department of the Bank of America, agricultural income in the trade area was 29.2% better than last year. The latest figures show a gain of 208% in new industries located and decrease of 50% in commercial failures.

A survey made by Ross investigators among typical food outlets showed a range running from slight declines to gains as high as 33 1/3% in March. Current business among the San Francisco stores of the Owl Drug Company is 38.5% better than last year, while across the bay in Oakland the gain is 36.5%. Most of the independent druggists reported gains over last year.

In the department store field the Emporium had a gain of 46%; I. Magnin Company 62%.

All automobile agencies reported gains, including 25% for Chevrolet; 30% Plymouth; 25% Pontiac; 95% Buick; 108% Packard; 39% Cadillac; 266% for the Retail Division of Hudson-Essex and 325% for the Wholesale Division.

San Diego, Cal.

	City	Retail Area
Population	147,995	209,659
% U. S. A. ....	.121	.172
Retail Outlets	2,349	3,289
% U. S. A. ....	.152	.212
Income Tax Returns.....	5,160	7,129
% U. S. A. ....	.152	.210

Counties in area and % increase in new passenger car sales, '33 over '32—CALIFORNIA: San Diego, 9.5.

Los Angeles, Cal.

	City	Retail Area
Population	1,238,048	2,844,181
% U. S. A.	1.016	2.317
Retail Outlets.....	17,887	40,622
% U. S. A.	1.155	2.622
Income Tax Returns.....	74,425	132,047
% U. S. A.	2.193	3.890
Bank Debits (Jan.-Feb.).....	increased 5.6%	
Department Store Sales (Feb.).....	increased 14.7%	
Factory Employment (Mar.).....	increased 38.6%	
Factory Payrolls (Mar.).....	increased 44.8%	
Counties in area and % increase in new passenger car sales, '33 over '32—CALIFORNIA: Imperial, 43.2; Inyo, 17.5; Kern, 84.5; Los Angeles, 53.1; Orange, 59.3; Riverside, 43.1; San Bernardino, 45.2; Santa Barbara, 28.6; Ventura, 40.4. ARIZONA: Mohave, -13.2; Yuma, 59.0. NEVADA: Clark, 34.8.		

Current Business Conditions

The following report by industries shows what has happened to the industries of Southern California in one year—March against March:

	Employment Up %	Payrolls Up %
Motion Pictures	101.7	90.4
Petroleum Products & Ref.	10.5	13.1
Metals, Mach., Conveyances	39.1	55.6
Furniture & Fixtures	32.1	103.6
Clothing & Millinery	13.2	36.1
Foods & Beverages	56.1	44.4
Stone, Clay, Glass	34.5	38.8
Leather, Rubber Goods	69.2	164.0
Printing	8.8	19.7
Explos., Chemicals, Paints	14.0	16.5
Textiles	49.1	71.8
Other Wood Mf'rs.	45.7	82.0
Publishing	5.4	6.6
Other Paper Products	33.5	41.1

First quarter figures show that the wholesale grocery business improved between 12 and 15%; wholesale drugs 30 to 36%, and that the department store business has been running from 12 to 18% better, with the exception of March, for which a larger increase is estimated.

In the automotive field 7,873 Chevrolets, Fords and Plymouths were sold in March as against 3,702 for March last year; 426 Buicks and Nashes against 287 last year, but Pierce-Arrow, Lincoln and Packards declined from 103 to 74. The total for all passenger car sales in March gained 87% and commercial car sales, 181%.

Agricultural income in the Los Angeles district is below last year's figure.

February employment in the city showed a 6% gain over January, and increases in weekly payrolls are greater than the gain in number of employees.

Building permits in March rose 35% above February, and also

showed a 39% increase over March, 1933. Comparative figures for recent months show:

February, 1934.....	990,185
January, 1934.....	980,328
February, 1933.....	701,509

Outside of government projects, most of the building is of single and double family dwellings. The city has a \$11,000,000 school rehabilitation program for the year.

The Port of Los Angeles is enjoying a big pick-up in business, and there was a very marked pick-up in foreign trade as to both imports and exports during February. Exports amounted to 329,229 tons, with a value of \$5,412,047 while in February, 1933, exports totaled 263,890 tons valued at \$3,880,182, or an increase in value over last year of nearly 40%. Imports amounted to 32,998 tons, valued at \$3,576,152 as against 32,689 tons valued at \$1,590,076 in February, 1933. While the gain in imports was very small as regards volume, the gain in value was 125%, due principally to the fact that large shipments of silk were received and also to the devaluation of the dollar. Total foreign trade was approximately \$9,000,000, compared to \$8,327,000 in January, 1934, and \$5,470,000 in February, 1933.

March postal receipts were 11% ahead of February and 2% of March, 1933, and bank debits were 15% ahead of February.

In the Santa Barbara area a new oil well, flowing at the rate of 2,000 barrels a day, was brought in during February, and has resulted in increased drilling activity in this section.

In the Riverside and other orange sections, orange shipments are now at the highest rate for the season, but the crop is less than last year and prices have not improved to a point where the net income to the grower is likely to show an increase.

Long Beach, twenty-two miles from Los Angeles, is a retail center for 300,000 people and for the majority of retail purchases it is an independent market.

Employment in Long Beach is maintaining a good level due to building activity and government projects and this has been reflected in retail sales where an improvement has been shown in current months, both in comparison with other months this year, and with last year's figures. (See additional information below).

Sacramento, Calif.

	City	Retail Area
Population	93,750	351,831
% U. S. A. ....	.076	.287
Retail Outlets.....	1,567	5,457
% U. S. A. ....	.101	.352
Income Tax Returns.....	4,940	11,262
% U. S. A. ....	.146	.332

Counties in area and % increase in new passenger car sales, '33 over '32—CALIFORNIA: Butte, 33.8; Colusa, 47.4; Eldorado, 4.9; Glenn, 85.3; Lassen, 50.0; Modoc, 33.9; Nevada, 29.9; Placer, 18.1; Plumas, 3.9; Sacramento, 12.3; Shasta, 11.2; Sierra, -2.6; Sutter, 112.7; Tehama, 10.0; Trinity, 52.1; Yolo, 22.8; Yuba, 100.0.

PERTINENT PAYROLL FACTS

about

**LONG
BEACH**
CALIFORNIA

ONE REASON why advertisers count on the Long Beach trading area for a huge and uniform sales total is the amazing diversification of its payroll source.

HERE are (1) oil production industries . . . 8 million dollar annual payroll. (2) Harbor industrial plants with payrolls totaling 6 million per year. (3) Retail center for 300,000 people (30 leading stores alone pay 1 1/2 million in salaries yearly). (4) Extraordinary building program in progress (It placed Long Beach 3rd city on Pacific Coast last year, though 7th in size!). (5) Steel Mills with a record number of men at work. (6) 2nd largest fishing port in the Nation. (7) World's largest single hay market. (8) Growing dairy industry (country's greatest concentration of dairy cattle in a given area). All these and more add to the variation and to the total.

**Here People Spend
as well as Earn!**

In total new car sales per capita last year, Long Beach took 2nd place among ALL cities in California over 100,000!

This Alert Market is Dominated by the

Press-Telegram and SUN
LONG BEACH, CALIFORNIA

MEMBERS: Audit Bureau of Circulation and the
Major Markets Newspapers, Inc.
National Representatives: WILLIAMS, LAWRENCE & CRESMER CO.
New York - Chicago - Detroit - San Francisco - Los Angeles

THE SAN FRANCISCO NEWS.

• Leads in Total Department Store Linage

Media Records Figures* . . . 9 months ending March 31, 1934

		Per Cent of City Total
NEWS (E) (6 days)	1,358,841	39.2
Call-Bulletin (E) (6 days)	807,634	23.4
Examiner (M & S)	690,937	20.0
Chronicle (M & S)	604,329	17.4

Note that The NEWS carried 551,207 lines more than the other evening paper. The NEWS carried 63,575 lines more than the combined total of the two morning papers daily and Sunday combined.

• Leads in UPSTAIRS Department Store Linage

NEWS (E)	959,545	32.4
Call-Bulletin (E)	768,811	26.0
Examiner (M & S)	652,210	22.0
Chronicle (M & S)	580,544	19.6

• Leads in Retail Grocery Linage

NEWS (E)	410,096	48.7
Call-Bulletin (E)	229,447	27.2
Chronicle (M & S)	111,417	13.2
Examiner (M & S)	90,955	10.9

Note that the NEWS carried almost double the lineage of the other evening paper, and carried 7,070 lines more than double the total combined lineage of the two morning and Sunday papers.

Because of its known merchandise-selling-power and the consistent local recognition of The NEWS in these three (and other) important classifications, The NEWS should be **FIRST** on the schedule of every advertiser who really wants to **SELL** the highly concentrated San Francisco market.

Let a Scripps-Howard representative show you The NEWS' Circulation Facts Nos. 1, 2 and 3, and you'll readily understand the reason for NEWS leadership.

*6 days against 7.

The San Francisco News

A Scripps-Howard Newspaper

NATIONAL ADVERTISING
DEPARTMENT OF
SCRIPPS-HOWARD
NEWSPAPERS

230 PARK AVENUE, N. Y. C.

CHICAGO . SAN FRANCISCO . LOS ANGELES . DALLAS



MEMBER OF THE UNITED
PRESS . . . OF THE AUDIT
BUREAU OF CIRCULATIONS
and of

MEDIA RECORDS, INC.

DETROIT . PHILADELPHIA . ATLANTA

Denver, Colo.

	City	Retail Area
Population	287,861	1,373,399
% U. S. A. ....	.234	1.111
Retail Outlets	4,426	17,877
% U. S. A. ....	.286	1.154
Income Tax Returns.....	14,589	33,690
% U. S. A. ....	.430	.993
Bank Debits (Jan.-Feb.).....	increased	21.9%
Department Store Sales (Feb.).....	increased	21.2%
Employment (March)	increased	20.0%
Payrolls (March)	increased	21.0%

Counties in area and % increase in new passenger car sales, '33 over '32—COLORADO: Adams, -23.0; Alamosa, 37.5; Arapahoe, 3.9; Archuleta, -44.4; Baca, -25.0; Bent, -31.5; Boulder, 5.1; Chaffee, 2.8; Cheyenne, -47.1; Clear Creek, 88.2; Conejos, 10.5; Costilla, 18.8; Crowley, 110.0; Custer, 100.0; Delta, 38.0; Denver, 18.2; Dolores, -37.5; Douglas, 40.0; Eagle, 52.0; El Paso, 11.1; Elbert, 66.6; Fremont, -6.3; Garfield, -23.0; Gilpin, -80.0; Grand, 52.4; Gunnison, -28.8; Hinsdale, -50.0; Huerfano, -10.8; Jackson, 212.5; Jefferson, 5.8; Kiowa, 61.3; Kit Carson, -54.6; Lake, 27.3; La Plata, 6.7; Larimer, 26.8; Las Animas, -23.2; Lincoln, 1.8; Logan, 9.3; Mesa, 25.0; Mineral, -16.7; Moffat, 21.4; Montezuma, -36.4; Montrose, 32.4; Morgan, 29.8; Otero, 32.8; Ouray, -43.7; Park, -16.9; Phillips, -50.9; Pitkin, -50.0; Prowers, 59.4; Pueblo, 70.8; Rio Blanco, 3.8; Rio Grande, 55.0; Routt, 28.9; Saguache, 68.4; San Juan, 15.4; San Miguel, -34.6; Sedgwick, -50.0; Summit, 33.3; Teller, 48.9; Washington, -46.0; Weld, 30.7; Yuma, -29.6. WYOMING: Albany, -10.9; Big Horn, 2.1; Campbell, 16.7; Carbon, 30.7; Converse, 19.2; Crook, 56.0; Fremont, -3.8; Goshen, 64.0; Hot Springs, -41.0; Johnson, -13.0; Laramie, 33.6; Natrona, 43.4; Niobrara, 31.9; Platte, 76.5; Sheridan, 20.0; Sweetwater, 10.2; Sublette, 75.0; Teton, 45.0; Washakie, 44.0; Weston, 11.1; Yellowstone Nat. Park, 62.5. KANSAS: Sherman, 33.3; Wallace, 87.5. NEBRASKA: Dundy, 42.3. NEW MEXICO: Colfax, 75.0; Harding, 28.5; Rio Arriba, 69.6; San Juan, 6.7; Taos, -7.7; Union, 25.5. OKLAHOMA: Cimarron, 51.7. TEXAS: Dallam, 37.0. SOUTH DAKOTA: Fall River, 12.9. UTAH: Daggett, 100.0; Grand, .0; San Juan, 200.0; Uintah, 200.0.

Current Business Conditions

Business conditions in the Denver area are easily 20% to 30% better than last year.

Automobile dealers are complaining that they cannot get enough cars from factories, and low-priced, medium-priced and high-priced cars are uniformly up from 25% to 50%.

A chain of 226 Safeway-Continental grocery stores showed a 10% increase in March, and other chains and independents range from a 3% decrease to a 20% increase.

Drug sales were up far more than grocery. The Walgreen chain had a 21% increase in March; Republic Stores, 50%; Pencil, 30%, etc.

Daniels & Fisher's department store, catering to high-class trade, had a 15% increase; Denver Dry Goods—general trade—20%; and Golden Eagle—low-class trade—a 15% increase.

Six hundred and sixty-two people are employed currently at the Swift & Company plant—this representing a 25% increase in employment, and a 21% increase in payrolls. The Gates Rubber plant is employing 1,450 people—a 32% increase in employment and 30% in payrolls.

Building contracts awarded in March were up about 5%. The increase in metal prices, especially silver, has stimulated mining activity in the Denver area; the sugar-beet industry is very hopeful; and higher prices have improved the meat business by 30%.

A number of Federal road projects are just starting and will give considerable relief to the unemployed during the Summer.

In the trading areas Colorado Springs has a vastly improved tourist outlook. Pueblo industries, especially the Colorado Fuel & Iron Company, have a greatly improved business, and there is good activity in such farming districts as Greeley and Fort Morgan.

Bridgeport, Conn.

	City	Retail Area
Population	146,716	386,702
% U. S. A. ....	.120	.315
Retail Outlets	2,181	5,420
% U. S. A. ....	.141	.350
Income Tax Returns.....	5,737	17,511
% U. S. A. ....	.169	.515

Counties in area and % increase in new passenger car sales, '33 over '32—CONNECTICUT: Fairfield, 32.5.

New Haven, Conn.

	City	Retail Area
Population	162,655	463,449
% U. S. A. ....	.132	.377
Retail Outlets	3,225	7,729
% U. S. A. ....	.207	.499
Income Tax Returns.....	8,619	19,704
% U. S. A. ....	.222	.581
Bank Debit (Jan.-Feb.).....	increased	5.8%
Department Store Sales (Jan.).....	increased	10.0%
Factory Employment (Jan.).....	increased	11.4%
Factory Payrolls (Jan.).....	increased	22.4%

Counties in area and % increase in new passenger car sales, '33 over '32—CONNECTICUT: New Haven, 40.2.

Current Business Situation

The New Haven Clock Company had 714 workers last March, 1,188 now. Winchester's employment roll jumped from 1,786 to 2,196 in the same period, and the average of New Haven's six largest employers was a gain of nearly 50%. Payrolls are up even more, with the New Haven Clock Company up 139%, and Winchester, 73%.

The money is going into immediate retail circulation: 10 typical grocers report business 22.4% better; 10 retail druggists, 15.7% better; 5 largest department stores, 24.4% better. The box-office business at the Warner theatres is up 40%. The Beaver Motor Car Company, distributors of Plymouths, reports business 81% better and the Cooley Chevrolet Company has had a 78% jump in sales. The average increase among Nash, Studebaker and Buick, was 16.6%, and the gain was 30.3% with Pierce-Arrow, Cadillac and Packard dealers. Increases in jobbers of heavy materials, and distributors of radios and washing machines, ranged from 10% to 80% with an average of 40%, while 5 jobbers of consumption articles, such as drugs, groceries and tobacco average 22%. March building contracts awarded were 121% higher than last year, and the Chamber of Commerce estimates that total payrolls were up 29% in February. The general opinion was very optimistic towards business outlook for the coming months.

Hartford, Conn.

	City	Retail Area
Population	164,072	583,700
% U. S. A. ....	.134	.475
Retail Outlets	2,313	6,759
% U. S. A. ....	.149	.436
Income Tax Returns.....	9,530	25,503
% U. S. A. ....	.281	.751
Bank Debits (Jan.-Feb.).....	increased	8.1%
Factory Employment (Jan.).....	increased	30.0%
Payrolls (Jan.)	increased	41.5%

Counties in area and % increase in new passenger car sales, '33 over '32—CONNECTICUT: Hartford, 44.0; Litchfield, 32.1; Middlesex, 29.0; Tolland, 58.0.

Current Business Conditions

Forty-two plants in Hartford County were employing 19,867 employes in January this year—an increase of 30%. Payroll figures secured from Hartford banks, and including the payrolls of insurance companies, etc., jumped from \$1,191,000 in January, 1933, to \$1,685,000 in the same month this year.

Attendance last month in moving picture theatres ranged from even with last year to a 40% increase for Loew's.

A group of selected grocery and drug stores reported no decreases, with the majority about even with last year, and some up as much as 15%.

A survey of the automobile dealers shows such significant changes as these: March sales of the Capitol Buick Company were 200% ahead of last year; Russell P. Taber had increases of 250% on Cadillac and LaSalle, and 450% on Oldsmobile; March unit sales of the Capitol Chevrolet Company jumped 200%; Chrysler and Plymouth sales of J. P. Nielsen gained more than 100%, as did Dodge and Plymouth sales of the Capitol Motor Car Company; March business of the Ford Motor Sales Company jumped from \$10,000 in 1933 to \$40,000 in 1934.

The March sales volume of General Electric oil burners was \$25,000 as against \$3,500 last year, and the Timken Company reports first quarter sales 25% better than last year.

The Canada Dry Ginger Ale Company reports a 43% increase in March, and the Shell Eastern Petroleum Company had an 18% gain. Factory man hours of labor per employe averaged 38 hours in March as against 27 hours in May, 1933.

Hartford—A Proving Ground for Advertising!

Automobile manufacturers have their proving grounds for their automobiles. Millions have been spent in reproducing conditions to be encountered on the open road.

National advertisers need their proving grounds also. More and more are advertisements being tested—for their ability to convince and to sell the product. Agencies and manufacturers like to use Hartford to launch their campaigns. The conditions in Hartford are ideal for proving their ads. Hartford to-day is one of the outstanding test cities of the country. Here is a market with annual sales of \$134,000,000—a market independent of metropolitan influence and a community responsive to advertising. The Hartford Times is the favorite newspaper for these testing campaigns. The unusually compact circulation of The Times reaching practically 93% of all families in Greater Hartford presents for these advertisers an opportunity to find the facts at one advertising cost.

The advertising lineage of The Times in 1933 was the third largest of the six day newspapers of the country.

The Hartford Times

Hartford, Conn.

Represented by J. P. McKINNEY & SON

New York

Chicago

San Francisco

Wilmington, Del.

	City	Retail Area
Population	106,597	264,207
% U. S. A. ....	.087	.215
Retail Outlets	1,990	3,947
% U. S. A. ....	.128	.255
Income Tax Returns.....	6,127	8,946
% U. S. A. ....	.181	.264

Counties in area and % increase in new passenger car sales, '33 over '32—DELAWARE: Kent, 19.2; New Castle, 33.3; Sussex, 25.5. MARYLAND: Cecil, 1.3.
(See page 403 for Washington, D. C.)

Jacksonville, Fla.

	City	Retail Area
Population	129,549	656,683
% U. S. A. ....	.106	.535
Retail Outlets	2,027	9,327
% U. S. A. ....	.131	.602
Income Tax Returns.....	4,794	11,436
% U. S. A. ....	.141	.337
Bank Debits (Jan.-Feb.).....	increased	15.5%
Payrolls (March)	8.8%	

Counties in area and % increase in new passenger car sales, '33 over '32—FLORIDA: Alachua, 34.8; Baker, -27.1; Bradford, -33.3; Brevard, 28.8; Clay, -20.6; Columbia, 10.6; Dixie, 44.3; Duval, 24.1; Flagler, 92.3; Franklin, 76.5; Gadsden, 75.2; Gilchrist, 25.0; Hamilton, 32.3; Indian River, 13.8; Jefferson, 48.0; Lafayette, -10.0; Lake, 22.4; Leon, 46.5; Levy, 63.4; Liberty, 200.0; Madison, 67.9; Marion, 40.7; Nassau, -17.9; Orange, 23.6; Osceola, 12.3; Putnam, 59.3; St. Johns, 1.0; Seminole, 22.0; Sumter, 83.7; Suwanee, 52.6; Taylor, 50.0; Union, 13.0; Volusia, 45.8; Wakulla, -7.2. GEORGIA: Charlton, 89.9.

Current Business Situation

In March 150 local concerns were employing 15,040 employees—a gain during the year of 9½% in numbers and 8.8%

in payroll. The State Agricultural Department estimates that agricultural income in the Jacksonville area is 5% higher than last year.

March business in food stores showed increases as follows: Winn Lovett (3 stores), 12%; Whiddon's (29 stores), 33¼%; Setzer's, 29%; Blue Front Stores, 10%.

The Lane chain of 12 drug stores improved their business 10% in March; Brown Drug Company (2 stores) 12%, and other leading stores gained from 10% to 15%.

Department store gains were tremendous last month—The J. C. Penney Company, 76%; Cohen's, 75%; Furchgott's, 79%.

The Burrell Motor Company (Chevrolet) March business was 20% above last year; Duval Motor Company (Ford), 125%; Auto Sales Company (Plymouth), 516%. The leading Graham distributor reported a 100% gain, the De Soto distributor, 400%; Cadillac, 133%, and Packard, 35%. The first quarter sales of automobile trucks showed a gain of 204% over last year and passenger car sales gained 70%.

For the first quarter of the year the city's construction total was \$703,426, as against \$167,110 last year. Postal receipts in March gained over February, as well as over the corresponding month last year.

Vessels entering the Jacksonville port during March totaled 165—only five less than the busiest month in the port's history. Fertilizer imports for the month were 8,653 tons—the greatest total since October, 1933. Jacksonville hotels in the first three months of the year improved their business 45% over last year.

St. Petersburg, Fla.

	City	Retail Area
Population	40,425	62,149
% U. S. A. ....	.033	.050
Retail Outlets	922	1,326
% U. S. A. ....	.060	.086
Income Tax Returns.....	1,636	2,199
% U. S. A. ....	.048	.065

Counties in area and % increase in new passenger car sales, '33 over '32—FLORIDA: Pinellas, 25.7.

A WHITE SPOT ON
THE BUSINESS MAP

St. Petersburg, Florida



HAVING just completed the finest tourist season of its history, St. Petersburg is naturally one of the white spots on the business map of Florida.

DURING the past winter tourist registrations were 43 per cent ahead of the previous year. Water consumption was 15½% ahead; electricity consumed showed an increase of 16%; postal receipts jumped 31%.

AUTOMOBILES entering the state were 23½% ahead of the season of 1932-33. The foreign-license cars coming into St. Petersburg over Gandy Bridge increased 27%. Bank deposits increased 63½%.

IT is conservatively estimated that 150,000 tourists visited St. Petersburg this season. An average expenditure of \$200 per capita would leave \$30,000,000 in this city.

ST. PETERSBURG has a permanent population of more than 40,000. These people have money to spend. They are good prospects for your products.

THIS market is covered by St. Petersburg newspapers. No outside newspaper has as much as 125 average daily circulation here. For further information address:

St. Petersburg Newspapers Service

Representing

St. Petersburg Times

Evening Independent

Represented nationally by Theis & Simpson Co., Inc., and Thos. F. Clark Co., Inc.

Current Business Conditions

O. R. Moe, president of the St. Petersburg Food Dealers Association, reports general food sales 25% better for the first quarter this year as compared with last year.

The leading wholesale cigar and candy jobber reports a general increase of around 40%.

The Weaver Wholesale Grocery Company reports an increase of between 25 and 40% for the first quarter.

The state distributor for General Electric products reports business 280% ahead in the first three months, with St. Petersburg's figures a little better than the general average.

The leading department store had a 52% increase in January; 60% in February; and better than 100% in March.

St. Petersburg had its best winter season in many years. Tourist registrations increased 43% over the preceding winter season. The foreign license cars coming into St. Petersburg over Gandy Bridge were 27% ahead of last year's four months' season.

Postal receipts for St. Petersburg showed a 23.4% gain in February over the preceding year, and a 43.5% gain in March.

Electricity consumption jumped 15.7% in February. Both sales and attendance at the February automobile show were greater than for several years past.

Top 30%, Frederick's Market 29%—with others, both chain and independent, reporting gains in excess of 20%. A group of typical drug stores showed average gains of 15% to 30%. March gains in the department stores were even greater, with Burdine's showing 40% gain and Mark's 54%.

Sam Murray, a Ford dealer, had a 400% gain in March. The Ungar Buick Company had a 300% gain; Nolan Peeler Cadillac Company 350%, with the same company's Pontiac business up 5%. The Lincoln distributor, the Dade Motor Sales Co., reports a 50% gain.

One thousand employees are now at work at Burdine's, a gain of 68% in number of employes and 74% in payrolls over last year. The Florida Light & Power Company (624 employes) is employing 25% more people and paying out 15% more in total payrolls.

Farmers have had a slight increase in production with about the same price level as last year. Retail dealers in the area report not only increases in gross sales, but also an increase in percentage of profit, and credit NRA Codes with much of the increase because they no longer have to cut prices to the bone.

Miami, Fla.

	City	Retail Area
Population	110,637	244,751
% U. S. A. ....	.090	.199
Retail Outlets	2,386	4,944
% U. S. A. ....	.154	.319
Income Tax Returns.....	3,633	7,047
% U. S. A. ....	.107	.208
Bank Debits (Jan.-Feb.).....increased	37.0%	
Department Store Sales (Feb.).....increased	43.5%	
Factory Employment (Feb.).....increased	25.4%	
Factory Payrolls (Feb.).....increased	23.3%	

Counties in area and % increase in new passenger car sales, '33 over '32—FLORIDA: Broward, 20.2; Dade, 44.3; Martin, 45.0; Monroe, -31.8; Okeechobee, 153.3; Palm Beach, 12.9; St. Lucie, 76.4.

Current Business Situation

Hotels and apartments in the Miami territory had their largest season since 1925 and it is generally believed that the number of visitors this winter exceeded any previous season. Hotel and other resort buildings are in need of repairs and replacements of furniture, and owners, thanks to the big season, now have the money to proceed with these improvements. Building permits for March in Miami Beach were \$516,000, as against \$77,150 last year, while in the city of Miami the corresponding figures were \$111,973 and \$52,143. Improvements costing \$1,900,000 will be started soon on Miami Harbor.

The Piggly-Wiggly Stores reported 60% gain in March; Tip

Tampa, Fla.

	City	Retail Area
Population	101,161	399,364
% U. S. A. ....	.082	.325
Retail Outlets	1,875	6,497
% U. S. A. ....	.121	.419
Income Tax Returns.....	2,667	7,724
% U. S. A. ....	.079	.228

Counties in area and % increase in new passenger car sales, '33 over '32—FLORIDA: Charlotte, 58.6; Citrus, -6.9; Collier, 100.0; DeSoto, 7.9; Glades, 27.8; Hardee, 11.8; Hendry, 1.5; Hernando, -2.5; Highlands, 12.5; Hillsborough, 22.5; Lee, 17.2; Manatee, 25.2; Pasco, 6.9; Pinellas, 25.7; Polk, 29.6; Sarasota, 9.4.

Atlanta, Ga.

	City	Retail Area
Population	270,366	1,355,707
% U. S. A. ....	.220	1.104
Retail Outlets	3,754	13,585
% U. S. A. ....	.242	.877
Income Tax Returns.....	12,376	16,891
% U. S. A. ....	.365	.498
Bank Debits (Jan.-Feb.).....increased	23.4%	
Department Store Sales (Feb.).....increased	32.5%	
Factory Employment (Jan.).....increased	20.0%	
Factory Payrolls (Jan.).....increased	25.0%	

Counties in area and % increase in new passenger car sales, '33 over '32—ALABAMA: Chambers, 242.7; Randolph, 140.0. GEORGIA: Banks, .0; Barrow, 100.0; Barton, 173.7; Butts, 153.3;

Carroll, 114.7; Cherokee, 107.6; Clarke, 60.3; Clayton, 89.7; Cobb, 93.1; Coweta, 122.2; Dawson, -6.2; De Kalb, 48.4; Douglas, 150.0; Elbert, 97.1; Fannin, 50.0; Fayette, 164.3; Floyd, 111.2; Forsyth, 21.7; Franklin, 91.3; Fulton, 44.8; Gilmer, 23.1; Gordon, 78.0; Greene, 208.7; Gwinnett, 91.9; Habersham, 62.5; Hall, 71.1; Haralson, 75.5; Heard, 400.0; Henry, 161.3; Jackson, 49.1; Lamar, 114.2; Lumpkin, 233.3; Madison, 133.3; Meriwether, 186.0; Morgan, 156.0; Murray, 14.3; Newton, 141.8; Oconee, 222.2; Oglethorpe, 33.3; Paulding, 100.0; Pickens, 25.0; Pike, 80.6; Polk, 141.7; Putnam, 200.0; Rabun, 27.3; Rockdale, 95.6; Spalding, 135.0; Stephens, 41.2; Towns, 120.0; Troup, 192.00; Union, 75.0; Upson, 85.8; Walton, 196.2; White, -15.3; Whitfield, 94.1. SOUTH CAROLINA: Abbeville, 257.5.

Current Business Conditions

Since the Spring of last year business has steadily improved in the Atlanta area, due to higher agricultural prices and Government stimulation through loans and crop allotments. Georgia

cotton farmers, for example, received nearly \$8,000,000 last year in direct payments for crop reductions.

This improvement in the agricultural areas has stimulated retail sales consistently. Frank H. Neely, general manager of Rich's, Inc., told the Ross investigator that he had just returned from a meeting of department store executives in New York, where it was shown that Atlanta retail sales showed the greatest percentage of increase of any city in the country. Both retailers and wholesalers are looking for continued improvement throughout the Spring.

A Ross check of grocery outlets, including independents and Piggly-Wiggly and A & P Stores, showed March increases of from 20% to 25% over last year, while drug store sales increases ranged from 20% to 35%.

Amusement business is more prosperous than in several years with attendance in the theatres running currently about 30% ahead of last year.

Most of the automobile dealers point to increases of at least 50% over last year's first quarter.

West Federal Service, Inc.
6 East 40th Street
New York City

DRUG STORE SURVEY FOR SALES MANAGEMENT

QUESTION: What manufacturer's brand of the following products do you recommend first, or deliver without comment, when a customer does not specify brand wanted, expresses uncertainty as to brand wanted, or specifically asks your advice?

Aspirin	SQUIBB
Will of Magnesia	SQUIBB
Hair Tonic	VITALIS
Spring Tonic or Build-up Tonic	A.D.S.
Head Cold Remedy	YAMOR-INHALANT
Cough Medicine	OWN-MAKE
Rubbing Alcohol	SHERFLIN
Headache Powder or Tablets	OWN-MAKE
Shaving Cream	COLGATE
Tooth Paste	COLGATE
Indigestion Remedy	OWN-MAKE
Stain Remover	CAROLINA
Sunburn Remedy	UNGUNTING
Hot Water Bottle	GOODRICH
Adhesive Tape	J & J
Cathartic	EX-LAX
Mouth Wash	A.D.S.
Sanitary Napkin	ROTEX

NOTE: Be sure to assure person interviewed that his name and address will not be used.

Name of store W. H. H. H.
City BOSTON
State MASS.

ALAN H. H.
ROSS INVESTIGATOR

Do Druggists Recommend Your Product?

SALES MANAGEMENT for May 1 will contain an SM-Ross Federal survey on 20 drug store classifications—as shown in the illustration. The survey was conducted early in April among independent druggists in the cities and wholesale trading areas of Boston, New York, Philadelphia, Detroit, Buffalo, Indianapolis, Cleveland and Chicago.

The answer to the question, "What manufacturer's brand do you recommend first, etc.," is a measure of the combined effectiveness of the manufacturer's salesmanship, his price policies, and the several forms of sales promotion which he may use. What the druggist pushes is most often what he sells.

A feature of the May 15 issue will be a similar survey of 20 classifications of the retail grocer's business.

Chicago, Ill.

	City	Retail Area
Population	3,376,438	5,834,871
% U. S. A.	2,750	4,752
Retail Outlets	43,576	73,631
% U. S. A.	2,813	4,753
Income Tax Returns.....	174,510	258,661
% U. S. A.	5,142	7,621
Bank Debit (Jan.-Feb.).....increased	9.0%	
Department Store Sales (Feb.).....increased	24.0%	
Factory Employment (Jan.).....increased	21.3%	
Factory Payrolls (Jan.).....increased	25.2%	

Counties in area and % increase in new passenger car sales, '33 over '32—ILLINOIS: Boone, 75.0; Bureau, 90.3; Carroll, 6.1; Cook, 37.5; DeKalb, 59.4; DuPage, 45.2; Ford, 56.9; Grundy, 43.9; Henry, 65.8; Iroquois, 63.8; Jo Daviess, -38.1; Kane, 33.0; Kankakee, 74.4; Kendall, 53.1; La Salle, 57.5; Lake, 48.7; Lee, 30.0; Livingston, 38.2; McHenry, 27.5; Ogle, 48.8; Putnam, -8.8; Stephenson, -1.5; Whiteside, 33.7; Will, 77.4; Winnebago, 98.3. INDIANA: Jasper, 76.5; Lake, 107.8; Laporte, 17.2; Newton, 92.3; Porter, 68.2; Starke, 18.2. WISCONSIN: Greene, .7; Kenosha, 12.7; Lafayette, -15.9; Rock, 3.6; Walworth, -9.6. MICHIGAN: Berrien, 52.6; Cass, 27.0.

Current Business Conditions

The Illinois Department of Labor estimates, from a study of employment and payroll reports of 624 firms of Chicago, an employment increase of 27.2% in February over last year, and a payroll increase of 41.6%. The Chicago *Tribune* estimates a 56% increase in building contracts in the first half of March as compared with last year. A group of 10 drug stores in various sections of the city shows an average increase of 8.8% in sales, but Chicago department stores did still better, as shown above.

Automobile dealers during February and the first half of March were handicapped through not being able to get sufficient

stock to fill orders. Actual registrations of medium-priced cars jumped 46% and similar good increases were shown by Ford and Plymouth dealers.

The consolidated average of Warner and Paramount theatres, and a group of selected independent houses, was 25.6% better than last year. The average increase of distributors of Frigidaire, General Electric refrigerators, Apex washing machines, and Federal radios, was 46.2%, while jobbers of consumption merchandise, including drugs, candies, etc., report business 40.7% better than last year. A group of Western Union offices showed an approximate 20% increase.

The reopening of the Fair will increase employment progressively to May 1, at which time an increased influx of visitors is expected.

The more important tributary cities, such as Kenosha, Racine, Waukegan, Gary, South Chicago, Aurora, Elgin, Joliet and Rockford, uniformly report increases. The Agricultural Implement Manufacturers' Association reports that members are showing increases from 90% up.

Peoria, Ill.

	City	Retail Area
Population	104,969	404,574
% U. S. A. ....	.085	.330
Retail Outlets	1,432	5,259
% U. S. A. ....	.092	.339
Income Tax Returns.....	3,745	7,390
% U. S. A. ....	.110	.218
Bank Debits (Jan.-Feb.).....increased	34.1%	
Factory Employment (Feb.).....increased	34.1%	
Factory Payrolls (Feb.).....increased	82.0%	

Counties in area and % increase in new passenger car sales, '33 over '32—ILLINOIS: Fulton, 40.8; Knox, 78.8; McDonough, 58.3; Marshall, 48.5; Mason, 50.0; Mercer, 29.8; Peoria, 46.6; Stark, 109.8; Tazewell, 51.0; Warren, 54.9; Woodford, 66.3.

Current Business Conditions

Peoria, since the middle of last summer, has been enjoying the results of \$16,000,000 worth of industrial building in the erection of new distilleries and breweries which has not only cleared up the local unemployment situation, but has forced the importation of hundreds of workers from the outside. There is a house shortage at present and a material rise in rental values.

No factory in Peoria at present is employing less than 80% of a normal number of workers, while many are running from 100 to 125%.

Wholesale grocer reports for the first three months of the year show a better than 21% gain over last year, while a large meat-packing house reports a March increase of 71,000 pounds over last year and a 23% dollar increase in business for the first three months of the year over the corresponding 1933 months.

The secretary of the Automobile Association is authority for the statement that new passenger car sales would have shown a 50% increase over 1933 in the first quarter had it been possible to get deliveries. Actual deliveries were about 25% better. The leading Ford dealer reports that March was the best month in 35 months—he was the only local dealer who was able to secure adequate deliveries all through the first quarter, whereas Chevrolet had no cars to deliver until after the middle of February; Oldsmobile had some Eights but no Sixes until the last two weeks of March; Hupmobile had no merchandise of any kind until the last week in March except a few experimental models.

Despite the fact that Peoria sales of electric refrigerators in March, 1933, were very good, sales last month were double those of the preceding year, and in the radio field March sales exceeded those of October, 1933, which was the biggest month that year. It is the consensus among radio dealers that the Spring business is the best in five years.

Evansville, Ind.

	City	Retail Area
Population	102,249	431,704
% U. S. A. ....	.083	.352
Retail Outlets	1,588	5,355
% U. S. A. ....	.103	.346
Income Tax Returns.....	2,414	4,246
% U. S. A. ....	.071	.125
Bank Debits (Jan.-Feb.).....increased	10.7%	
Department Store Sales (Feb.).....increased	10.4%	

Counties in area and % increase in new passenger car sales, '33 over '32—KENTUCKY: Henderson, 50.0; Union, 37.1; Webster, 18.2. ILLINOIS: Edwards, 14.2; Gallatin, 75.6; Hamilton, 25.0;

PEORIA Is Out In Front

● Bank debits are 134% of a year ago and there are only three other cities which are higher . . . Payrolls are 182% of a year ago and only one other city shows a greater increase . . . Building is 616% of a year ago and is the highest of all cities* . . . And this "Bright Spot" market is thoroughly covered by Peoria's greatest newspaper, THE PEORIA JOURNAL-TRANSCRIPT, representing, by thousands, the largest group of buyers available.

THE PEORIA JOURNAL-TRANSCRIPT
Read In "4 Out of 5" Peoria Homes

Represented by

CHARLES H. EDDY CO.

Chicago

New York

Boston

The net paid circulation of THE PEORIA JOURNAL-TRANSCRIPT (Daily) is now 39,247 which represents an increase of 17% over the Sept. 30, 1933 ABC Audit Report.

* From The Brookshire Sales and Credit Map, map section, February 28, 1934.

CHICAGO AMERICAN

Total Advertising
for the first three months of 1934

GAINED
497,799 Lines
or 34.3% over 1933

For the same period, the second
evening newspaper gained
225,667 lines or 8.4%

—of further interest to Advertisers

Average Net Paid Circulation
for the first three months of 1934

460,153
a GAIN of
more than 24,000 Copies over 1933

CHICAGO AMERICAN

... gives 450,000 Families Buying Ideas

NATIONAL REPRESENTATIVES: Rodney E. Boone Organization

Saline, 10.8; Wabash, 13.4; Wayne, 58.8; White, 24.0. INDIANA: Dubois, 19.5; Gibson, 20.3; Perry, -10.4; Pike, .7; Posey, 58.0; Spencer, 13.9; Vanderburg, 51.0; Warrick, 34.7.

Current Business Conditions

Employment among private industries in the Evansville area has reached 67% of normal status, and, including CWA and PWA projects, employment is at 86% of normal.

Manufacturing production during the first quarter gained approximately 15% over last year.

All retail stores report satisfactory gains—the range of gain from 5 to 25% for the first quarter.

One large wholesale grocery company reports a 25% increase; another 20%.

Motion picture attendance at typical theatres is approximately 25% higher than last year.

Fort Wayne, Ind.

	City	Retail Area
Population	114,946	357,254
% U. S. A. ....	.094	.291
Retail Outlets	1,459	4,192
% U. S. A. ....	.094	.271
Income Tax Returns.....	3,728	5,973
% U. S. A. ....	.110	.176

Counties in area and % increase in new passenger car sales, '33 over '32—INDIANA: Adams, 41.4; Allen, 37.0; DeKalb, 22.7; Huntington, 32.2; Kosciusko, 25.5; Lagrange, 72.5; Noble, 28.6; Steuben, 38.4; Wabash, 32.0; Wells, 80.6; Whitley, 28.3.

Indianapolis, Ind.

	City	Retail Area
Population	364,161	1,222,037
% U. S. A. ....	.297	.995
Retail Outlets	4,911	15,650
% U. S. A. ....	.317	1.010
Income Tax Returns.....	16,149	24,500
% U. S. A. ....	.476	.721
Bank Debits (Jan.-Feb.).....increased	7.3%	
Department Store Sales (Feb.).....increased	19.3%	
Factory Employment (Jan.).....increased	23.9%	
Factory Payrolls (Jan.).....increased	31.6%	

Counties in area and % increase in new passenger car sales, '33 over '32—INDIANA: Bartholomew, 43.0; Boone, 30.4; Brown, 50.0; Clinton, 69.8; Daviess, 11.0; Decatur, 24.8; Fayette, 35.4; Grant, 42.0; Hamilton, 69.4; Hancock, 122.6; Hendricks, 32.4; Henry, 45.7; Howard, 116.6; Jackson, 42.3; Jefferson, 2.0; Jennings, 12.4; Johnson, 21.5; Knox, 53.6; Lawrence, 12.4; Madison, 110.8; Marion, 25.7; Martin, -3.2; Monroe, 38.2; Montgomery, 30.1; Morgan, 33.6; Orange, 28.0; Owen, 1.1; Putnam, 29.5; Rush, 83.2; Scott, 18.2; Shelby, 63.1; Tipton, 84.5; Washington, 66.7.

Current Business Conditions

According to Chamber of Commerce estimates, current payrolls of all types in the city are 38% higher than last year, and the Farm Bureau estimates there is a 10% increase in agricultural income in the area.

Ross investigators found that the dollar sales of typical food outlets are 5% to 50% better than last year, while druggists, including independents and chains such as Liggett's, are 15% to 33% better off—most of them crediting liquor sales for the major share of the increases.

Department store sales gains are still greater, with I. S. Ayres & Company reporting a 52% increase over last year, and Sears, Roebuck, 54%.

In the automotive field, total sales of all new passenger cars in the first half of March jumped 129% over the same period last year, and Ford's March business was 145% higher; Chevrolet, 71%; Buick, 80%; Nash, 40%; Studebaker, 33½. Out of six dealers contacted by Ross, only Packard reported a loss.

Motion picture attendance was 15 to 20% better than last year.

The Real Silk Hosiery Mills are employing 23.3% more factory and office workers; the Continental Steel Corporation is not only employing more workers, but announced a 10% wage increase to take effect April 1; and Delco-Remy and the Chrysler Corporation have expanded operations to such an extent that houses are at a premium in Muncie, Anderson and New Castle.

Trucking companies employed by Indianapolis wholesalers report increased tonnage ranging from 54% to 100% over the same

period last year, and the Farm Bureau says that more orders had been received this Spring for fertilizer and new farm machinery than any Spring in three years.

South Bend, Ind.

	City	Retail Area
Population	104,193	253,985
% U. S. A. ....	.085	.207
Retail Outlets	1,522	3,056
% U. S. A. ....	.098	.197
Income Tax Returns.....	3,187	5,398
% U. S. A. ....	.094	.159

Counties in area and % increase in new passenger car sales, '33 over '32—INDIANA: Elkhart, 38.2; Marshall, 15.7; St. Joseph, 32.5.

Current Business Conditions

Retail merchants reported Easter business as the largest since 1928, and the Secretary of the Automobile Dealers' Association reports that new car sales in South Bend and Mishawaka for the first quarter totaled 534 cars, as against 328 last year, while 1,702 used cars were sold, as against 665 last year.

Studebaker orders in March totaled 10,067—more than any previous month since March, 1929, when 11,112 orders were received. The 1934 Studebaker models were introduced October 1, last year, and from then until March 31, 34,364 cars were produced—a total larger than during any comparable period since 1929.

Beginning March 4, the payrolls of 3,400 workers in the plants of the Bendix Corporation were increased \$25,000 a month, and a second increase of 5% has been announced, effective June 1. The present payroll in the Bendix plants is \$475,000 a month.

On March 14, the Oliver Farm Equipment Company raised the pay of its 1,500 employees 12%, and during March Wilson Brothers added 200 employees and now have a payroll of 2,000.

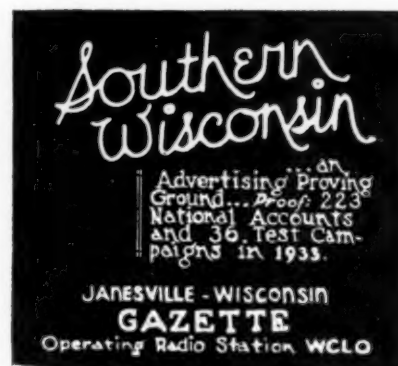
Drug jobbers report first quarter sales as 30% better than last year, while grocery jobbers also report a 30% increase in sales, and a collection increase of 33½%. Sales of the chain drug companies are 20% better than the quarter, with March running 35% better than last March.

Sales of automotive equipment and electric refrigerators were from 17 to 20% ahead of the corresponding quarter a year ago.

Terre Haute, Ind.

	City	Retail Area
Population	62,810	288,676
% U. S. A. ....	.051	.235
Retail Outlets	1,260	4,048
% U. S. A. ....	.081	.261
Income Tax Returns.....	1,775	3,320
% U. S. A. ....	.052	.098

Counties in area and % increase in new passenger car sales, '33 over '32—ILLINOIS: Clark, -9.4; Crawford, 27.5; Edgar, 54.6. INDIANA: Clay, 26.2; Greene, 19.7; Parko, 13.4; Sullivan, 40.1; Vermillion, -14.1; Vigo, 19.3.



NEITHER APRIL SHOWERS NOR FOG COULD STAY THESE THOUSANDS FROM THEIR SHOPPING



April 6th . . . Jupiter Pluvius looks at his calendar . . . "Suburban Day in Indianapolis, sponsored by the merchants and The News exclusively, eh! . . . well, I'll give those guys something to remember me by!"

And so it fogged and it rained. But "Pluvy" took a beating . . . thousands of shoppers couldn't resist the bargains advertised exclusively in The News . . . they came to Indianapolis and they bought.

Let's listen to the men who know what the actual results of Suburban Day were:

S. A. Sullivan, Director of Publicity at L. S. Ayres & Co., "It was old home day at Ayres. We delivered goods to towns we'd almost forgotten" . . .

George H. Binger, Advertising Manager of the Wm. H. Block Co., "Suburban Day was a success at Block's. In fact, our volume was much greater than we expected" . . .

E. O. Campbell, Manager, J. C. Penney Co., "We were very much pleased with the response to Suburban Day; particularly with the large number of out-of-town shoppers" . . .

Leonard A. Murchison, General Merchandise Manager, H. P. Wasson & Co., "It demonstrated conclusively the fact that The News has lost none of its power as a first-rate newspaper" . . .

May we modestly add: this is but another demonstration of the ability of The Indianapolis News to do the advertising job ALONE.

THE INDIANAPOLIS NEWS

SELLS THE INDIANAPOLIS RADIUS

New York:

Dan A. Carroll
110 East 42nd St.

Chicago:

J. E. Lutz
180 N. Michigan Ave.

APRIL 20, 1934

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Des Moines, Ia.

	City	Retail Area
Population	142,559	1,034,418
% U. S. A.116	.843
Retail Outlets	2,031	13,806
% U. S. A. ....	.131	.891
Income Tax Returns.....	5,315	11,548
% U. S. A. ....	.157	.340
Bank Debits (Jan.-Feb.).....	increased	6.6%
Factory Employment (Jan.).....	increased	10.0%
Factory Payrolls (Jan.).....	increased	20.0%

Counties in area and % increase in new passenger car sales, '33 over '32—IOWA: Adair, 94.0; Adams, 45.1; Appanoose, 14.1; Audubon, 1.5; Benton, 37.7; Boone, 35.6; Calhoun, 109.3; Carroll, 53.7; Cass, 34.6; Clarke, 45.5; Crawford, 21.6; Dallas, 81.4; Davis, 56.8; Decatur, 50.8; Dickinson, 131.6; Emmet, 103.9; Franklin, 68.5; Greene, 100.0; Guthrie, 69.8; Hamilton, 50.5; Hancock, 23.2; Hardin, 81.7; Humboldt, 188.2; Jasper, 104.4; Keokuk, 17.0; Kossuth, 43.5; Lucas, 34.0; Madison, 5.1; Mahaska, 53.4; Marion, 29.4; Marshall, 71.8; Monroe, -33.7; Palo Alto, 139.6; Pocahontas, 115.8; Polk, 27.2; Poweshiek, 46.0; Ringgold, 28.8; Story, 42.6; Tama, 57.7; Taylor, 32.8; Union, 23.0; Warren, 24.9; Wayne, -9.6; Webster, 77.9; Winnebago, 76.0; Wright, 76.9.

Current Business Conditions

The Ross investigators interviewed manufacturing executives, district sales managers, publishers, department store executives, Chamber of Commerce officials, city officials, automotive dealers, and heads of amusement enterprises—all agreed that business in every line has increased and will continue to increase for several months to come.

Net farm income per farm increased from \$805 in 1932, to \$2,227 in 1933, according to a survey in eight typical Iowa counties. Improved farm conditions are reflected in the better returns on insurance company owned lands. Equitable, for example, had a deficit on its farm properties in 1932. In 1933 they made 3.3%, and so far in 1934 the figure is 3.89%.

More new cars were sold in Des Moines in March than in any other March since 1929. Six hundred and thirty-eight passenger cars and trucks were sold in the City of Des Moines this March as compared with 226 last year, and 340 in February, this year.

First quarter sales of the National Life Insurance Company were 79% higher than last year; for the Bankers Life, the gain was 28%, and for all insurance companies in the State of Iowa, sales were 17% better in February than in January.

Building permits in March were \$187,491—more than double the total for January and February.

Wall paper sales in the city for the first quarter were 84% greater than the similar period last year.

Telephone installations have shown a steady increase since the first of the year—with 161 new installations in the first fifteen days of March.

The circulation of the Des Moines Register and Tribune on April 1 was 80,000 higher than on the same day in 1933; during the month of March local display advertising in the Daily Register was 90% greater than the same month last year, and on the Des Moines Tribune the increase was 30%, and the Sunday Register, 40%.

A group of five typical grocery stores surveyed by Ross showed average March increases of 12%. A group of typical drug stores showed average gains of 12%—one store having a decrease of 7%, with the others reporting gains ranging from 10% to 25%.

Frankel's Clothing Store reported business 82% better this March than last, with some departments more than double last year's figures. Another leading store reported a 30% gain. Ten thousand people attended the opening of the New Utica Clothing Store on March 22.

Manufacturing industries show uniform increases in employment and payrolls—the F. W. Fitch Company had 20% more employees, and 12% greater payrolls; the Armand Company reports a 25% employment increase in its factories, 12% in its offices, and a payroll increase of 12%.

Iowa farmers during 1934 will receive benefit payments of \$72,890,000 from the Government. The corn benefit will amount to \$26,000,000, with half payable in April and May, the other half payable November 15. The hog benefits of more than \$47,000,000 will be paid as follows: Two-fifths, April and May; one-fifth, November 15; two-fifths, February 1, 1935.

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Sioux City, Ia.

	City	Retail Area
Population	79,183	630,287
% U. S. A.064	.513
Retail Outlets	1,059	7,841
% U. S. A. ....	.068	.506
Income Tax Returns.....	2,241	7,878
% U. S. A. ....	.066	.232

Counties in area and % increase in new passenger car sales, '33 over '32—IOWA: Buena Vista, 45.0; Cherokee, 102.0; Clay, 55.6; Ida, 51.6; Lyon, 29.5; Monona, 65.2; O'Brien, 31.5; Osceola, 81.0; Plymouth, 29.3; Sac, 60.0; Sioux, 16.3; Woodbury, 57.0. MINNESOTA: Rock, 38.1. SOUTH DAKOTA: Aurora, 100.0; Beadle, 11.8; Bon Homme, 61.9; Brule, 64.5; Buffalo, 30.0; Butte, 67.1; Charles Mix, 4.2; Clay, 13.6; Custer, 46.9; Davison, -9.0; Douglas, 19.0; Hand, 81.0; Hanson, -7.7; Harding, 33.3; Hughes, 2.1; Hutchinson, 40.7; Jackson, 133.3; Jerauld, -29.4; Jones, .0; Lawrence, 65.3; Lyman, -42.9; Meade, 30.4; Mellette, -15.8; Pennington, 51.3; Perkins, 69.0; Sanborn, -28.2; Stanley, 85.7; Tripp, -15.9; Union, 76.7; Yankton, 3.1. NEBRASKA: Cedar, -4.8; Dakota, 7.4; Dixon, -24.2.

Wichita, Kan.

	City	Retail Area
Population	111,110	654,777
% U. S. A. ....	.090	.533
Retail Outlets	1,599	8,989
% U. S. A. ....	.103	.580
Income Tax Returns.....	3,915	11,971
% U. S. A. ....	.115	.353
Bank Debits (Jan.-Feb.).....	increased	13.4%
Department Store Sales (Feb.).....	increased	30.0%
Factory Employment (Mar.).....	increased	3.0%
Factory Payrolls (March).....	increased	10.0%

Counties in area and % increase in new passenger car sales, '33 over '32—KANSAS: Barber, 61.9; Butler, 70.7; Clark, 85.2; Comanche, 11.1; Cowley, 42.7; Edwards, 7.7; Elk, 44.8; Ford, 44.1; Grant, 28.6; Gray, -3.8; Greenwood, 21.3; Hamilton, 392.3; Harper, 155.1; Harvey, 71.3; Haskell, 175.0; Hodge-man, 42.9; Kearney, 92.2; Kingman, 56.2; Kiowa, 16.7; Marion, 54.0; Meade, 57.1; Norton, 4.0; Pawnee, 43.3; Pratt, 83.7; Reno, 88.9; Rice, 133.7; Sedgewick, 49.3; Seward, 70.2; Stafford, 17.5; Stanton, 26.3; Stevens, -25.8; Sumner, 74.6. OKLAHOMA: Alfalfa, 183.3; Beaver, 39.1; Ellis, 19.6; Grant, 220.5; Harper, 66.7; Texas, 29.3; Woods, 63.9; Woodward, 78.9. TEXAS: Lipscomb, 121.7.

Current Business Situation

According to the estimates of local business men, business as a whole is about 25% better than last year. The banks are loosening up in loans and business men are starting to plow money into the improvement of their plants and stores. It is believed that a reasonably good wheat crop this year at a fair price will bring conditions back to normal.

According to a check-up among grocery outlets made by Ross Federal Service, dealers are currently enjoying an upturn of from 3% to 20%, while in the drug trade gains range from 5% to 30%.

Low priced cars are 12% to 20% ahead of last year; medium priced cars about 8% and high priced cars 12½% better. The Federal Land Bank is employing 600 people—a 50% increase over last year in numbers and 40% in payroll. The Jacob Dold Packing Company's 200 employees represent a 5% increase in numbers and 7% in payroll. Building operations are about 30% better than last year, as are income tax collections. Newspaper advertising is approximately 20% better.

Louisville, Ky.

	City	Retail Area
Population	307,745	1,202,648
% U. S. A. ....	.251	.980
Retail Outlets	3,952	12,836
% U. S. A. ....	.255	.829
Income Tax Returns.....	11,267	16,081
% U. S. A. ....	.332	.474
Bank Debits (Jan.-Feb.).....	increased	32.1%
Department Store Sale: (Feb.).....	increased	14.7%
Employment (Feb.).....	increased	9.7%
Payrolls (Mar.).....	increased	40.0%

SALES MANAGEMENT

Counties in area and % increase in new passenger car sales, '33 over '32—KENTUCKY: Adair, -7.7; Allen, 41.0; Anderson, 90.5; Barren, 60.7; Boyle, 57.4; Breckinridge, 5.9; Bullitt, -7.8; Butler, -29.0; Caldwell, 5.3; Carroll, 9.5; Casey, -40.0; Christian, -14.5; Crittenden, 9.1; Cumberland, -15.0; Daviess, 25.9; Edmonson, -38.7; Franklin, 3.4; Grayson, 14.0; Green, 33.3; Hancock, 42.1; Hardin, .5; Hart, -20.0; Henry, 78.4; Hopkins, 10.7; Jefferson, 51.5; Larue, 74.1; Lincoln, -19.3; Logan, 47.1; Lyon, 22.7; McLean, 23.3; Marion, 44.7; Meade, 53.8; Mercer, 154.1; Metcalfe, -35.5; Monroe, -25.0; Muhlenberg, 29.5; Nelson, 75.3; Ohio, -20.7; Oldham, 44.0; Shelby, 53.5; Simpson, 2.2; Spencer, 104.8; Taylor, 69.1; Todd, 53.1; Trigg, -2.0; Trimble, 87.5; Warren, 21.2; Washington, 51.7. INDIANA: Clark, 66.0; Crawford, -47.2; Floyd, -1.2; Harrison, 22.5.

Current Business Conditions

The coming of repeal has hastened Louisville's return to prosperity, for, in addition to the distillery output in and around the city, a number of allied businesses have resumed operations in a big way—such as makers of staves and kegs.

It is the belief of local officials that total payrolls in the city are currently 40% higher than last year.

The Ross investigator in his survey of grocery store sales found that the poorest current increase was 10% above last year, and that the average was nearly 20%.

Druggists are finding an even greater improvement, with increases ranging from 20 to 75%.

The largest department stores report startling increases—Jefferson Dry Goods Company, 95%; and J. Bacon & Company, 55%.

Automobile sales are running well ahead of last year in every classification. Among the dealers in low-priced cars, the Ross investigator found such increases as: Broadway Motors, 49%; Summers-Herrman, 80%; among the dealers in the middle-priced field, Leyman Motors had a 40% increase last month; and Prince-Wells & Company, 50%; the Packard-Louisville Motor Company's business is 20% ahead, and that of the leading Lincoln dealer, 10%.

Motion picture attendance among a group of theatres of large seating capacities, shows increases ranging from 15 to 30%.

The Brown & Williamson Tobacco Company is currently employing 1,100 workers—an increase of 30% in number of employees, and 20% in payrolls; and another leading industry, the Wood Mosaic Flooring Company, has 650 employees—a 50% increase in employment and payrolls, over the same period last year.

Current building permits, according to Chamber of Commerce figures, are 93% ahead of last year in dollar volume.

The County Agent estimates that there is a 20% increase at present in agricultural income in the Louisville area over last year.

New Orleans, La.

	City	Retail Area
Population	458,762	1,498,103
% U. S. A. ....	.374	1.220
Retail Outlets	7,912	18,394
% U. S. A. ....	.511	1.187
Income Tax Returns.....	16,362	23,491
% U. S. A. ....	.482	.692
Bank Debits (Jan.-Feb.).....increased	1.2%	
Department Store Sales (Feb.).....increased	24.7%	
Payrolls (Feb.)	15.0%	

Counties in area and % increase in new passenger car sales, '33 over '32—LOUISIANA: Acadia, 170.3; Ascension, 29.3; Assumption, 47.5; Avoyelles, 69.1; Cameron, 12.0; E. Baton Rouge, 34.2; East Feliciana, 50.0; Evangeline, 91.3; Iberia, 37.0; Iberville, 33.6; Jefferson, 65.7; Jefferson Davis, 103.8; Lafayette, 61.5; Lafourche, -12.9; Livingston, 54.6; Orleans, 20.0; Plaquemines, -12.8; Pointe Coupee, .0; St. Bernard, -12.8; St. Charles, 40.4; St. Helena, 12.1; St. James, -17.4; St. John the Baptist, -47.9; St. Landry, 104.3; St. Martin, 84.2; St. Mary, -4.6; St. Tammany, 77.9; Tangipahoe, 41.4; Terrebonne, 44.9; Vermilion, 108.9; Washington, 55.3; W. Baton Rouge, 12.7; Feliciana, -2.6; MISSISSIPPI: Amite, 2.9; Franklin, 329.4; Hancock, 55.2; Harrison, 53.4; Lamar, 94.4; Lincoln, 112.8; Marion, 103.9; Pearl River, 69.1; Pike, 121.7; Stone, -3.8; Walthall, 80.6; Wilkin-son, 48.0.

Current Business Conditions

The amusement industry, a good barometer at all times of local conditions, bears witness to the uptrend in the New Orleans area. The film exchanges report current gains over last year as follows: Warner Bros., 30%; M.G.M., 30%; Fox Film Corp., 34%.

The New Orleans Motor Co. (Ford) reports a 100% gain over last year, while J. B. Cathey, a Chevrolet dealer, reports a 200% gain. A Studebaker agency, the Capital City Auto Co.,

had a 100% gain in March and the Nash Sales and Service Corporation, in explaining their 30% increases say that they could have done far better had it not been for strike troubles in the Nash factory at Kenosha. The Cadillac Motor Co. reports a 150% gain.

The D. H. Holmes Co., largest department store, had a 92% gain in March, while the Sears, Roebuck unit (Feibleman's) gained 90%. The H. G. Hill Co., with a chain of 97 grocery stores, had a 12% March gain and four out of five grocers reported gains of from 10% to 25%.

Hotel men report the best business in years. The high rate of European foreign exchange has diverted many travelers to Central America and their stop-offs in New Orleans help retail business. The city has had an increased number of visitors from Mississippi, a dry state. Ten per cent more foreign ships came into the port this March as compared with last year. The number of building permits this March increased over last year, but there was a slight decrease in dollar values.

Portland, Me.

	City	Retail Area
Population	70,810	267,697
% U. S. A. ....	.058	.218
Retail Outlets	1,225	4,108
% U. S. A. ....	.079	.265
Income Tax Returns.....	4,145	8,191
% U. S. A. ....	.122	.241

Counties in area and % increase in new passenger car sales, '33 over '32—MAINE: Cumberland, 14.7; Knox, -16.6; Lincoln, -18.2; Sagadahoc, 24.8; York, 28.8.

Baltimore, Md.

	City	Retail Area
Population	804,874	1,428,839
% U. S. A. ....	.656	1.164
Retail Outlets	12,285	19,314
% U. S. A. ....	.793	1.247
Income Tax Returns.....	33,933	42,507
% U. S. A.	1.000	1.252
Bank Debits (Jan.-Feb.).....increased	2.9%	
Department Store Sales (Feb.).....increased	13.3%	
Factory Employment (Jan.).....increased	19.8%	
Factory Payrolls (Jan.).....increased	46.5%	

Counties in area and % increase in new passenger car sales, '33 over '32—MARYLAND: Anne Arundel, 4.9; Baltimore, 23.6; Calvert, 16.8; Caroline, 52.1; Carroll, .8; Dorchester, 42.1; Frederick, 10.1; Harford, -2.3; Howard, 9.0; Kent, 4.4; Queen Anne's, -16.4; St. Mary's, -27.2; Somerset, -20.6; Talbot, 41.1; Wicomico, 6.8; Worcester, 18.5; Baltimore City, 10.7. VIRGINIA: Accomas, 32.1; Essex, 7.4; Lancaster, 1.4; Northumberland, 3.2; Richmond, -34.8. WEST VIRGINIA: Berkeley, 37.0; Jefferson, 95.4.

Current Business Conditions

Collections by the Bureau of Receipts of Baltimore City for the first three months of 1934 gained 24% over the same period last year. This encouraging development recalls that Baltimore's tax collections last year (84% of assessments) elicited nationwide comment.

The City's finances are a reflection of the improved economic condition of Baltimore's private citizens and business. The City completed the year 1933 with a municipal budget surplus (an unexpended appropriation balance) of more than \$950,000. It has set aside \$500,000 to pay for public improvements in 1934 on the "pay as you go" plan.

Its all-inclusive tax return has been reduced from \$2.65 to \$2.45 and it has given additional relief to tax payers by a reduction in the taxable basis of \$29,803,024.

The City has restored in full salaries of all employees earning less than \$1,200 a year, and has made substantial restorations of all other salary contributions.

1933 figures show Baltimore higher than the national average in bank debits by 9.6%; department store sales, 10.9%; new passenger car sales, 1.5%; and building permits, 11.1%.

Foreign trade valued at \$7,966,880 passed through the port of Baltimore in February, the Export and Import Bureau of the Baltimore Association of Commerce announced today. The foreign trade volume for February was a 97.3% increase over the port's business in February of last year.

The foreign trade for the month consisted of exports of \$3,051,218 and imports of \$4,915,662.

Exports especially showed a great increase over the same month of last year, the gain being 202%. Imports during February were 62.2% greater than in 1933.

Boston, Mass.

	City	Retail Area
Population	781,188	3,323,175
% U. S. A. ....	.636	2.706
Retail Outlets	9,972	41,991
% U. S. A. ....	.644	2.710
Income Tax Returns.....	45,793	168,705
% U. S. A.	1.349	4.971
Bank Debits (Jan.-Feb.).....	increased 16.5%	
Department Store Sales (Jan.).....	increased 23.0%	
Factory Employment (Feb.).....	increased 10.9%	
Factory Payrolls (Feb.).....	increased 15.0%	

Counties in area and % increase in new passenger car sales, '33 over '32—MASSACHUSETTS: Barnstable, 6.3; Dukes, -16.5; Essex, 28.0; Middlesex, 26.0; Nantucket, -33.7; Norfolk, 30.7; Plymouth, 22.5; Suffolk, 10.7. NEW HAMPSHIRE: Belknap, 15.8; Carroll, 7.8; Cheshire, 20.1; Coos, 9.5; Grafton, 4.6; Hillsborough, 25.9; Merrimack, 21.4; Rockingham, 15.6; Strafford, 51.9; Sullivan, 19.5. VERMONT: Orange, 12.0; Windham, 12.7.

Current Business Situation

According to the Boston Chamber of Commerce, business in the area during January, February and March compares favorably with the 1933 big months of May, June, July and August. Not only do employment figures compare favorably with last year, but manufacturing establishments in February were employing 6.5% more workers than in January and the payrolls were increased 10.7%. These current increases are much more than seasonal and the employment level is now back to the average of the year 1931.

Conditions in the boot, shoe and textile industries are generally good and among all the industries the women's clothing group shows the greatest relative gain.

A group of representative grocery stores showed an average increase of 10% over last year; the drug business was slightly better. Unseasonable, cold and stormy weather held down department store sales in the first quarter but the level was well ahead of last year. The C. W. Muldoon Ford Agency increased its business 115% over last March; the Dorchester Buick Company reports that Buick sales are exceeding Pontiac this year. Attendance at the Keith Theatre was 100% better than last year and theatre managers in all sections of the area report substantial increases.

Textile production in the Boston area during March was at a rate of 29% greater than the 1932 figure, according to Dun & Bradstreet's.

Springfield, Mass.

	City	Retail Area
Population	149,900	578,609
% U. S. A. ....	.122	.471
Retail Outlets	2,233	8,157
% U. S. A. ....	.144	.527
Income Tax Returns.....	7,423	22,243
% U. S. A. ....	.219	.655
Bank Debits (Jan.-Feb.).....	increased 2.7%	
Department Store Sales (Feb.).....	increased 32.4%	
Factory Employment (Jan.).....	increased 22.0%	
Factory Payrolls (Jan.).....	increased 83.2%	

Counties in area and % increase in new passenger car sales, '33 over '32—MASSACHUSETTS: Berkshire, 18.4; Franklin, 28.9; Hampden, 23.0; Hampshire, 23.8.

Current Business Situation

Both wholesalers and retailers report big gains in January and February. The larger jobbers of radios and washing machines report a 75% increase in sales over March, 1933. Breckenridge, Inc., reports March sales on refrigerators and ranges as 100% greater than last year and three months' figures show an increase of 55%. The largest shoe outlet in Springfield has a gain of 53%. Several leading food outlets report gains of from 37% to 50%. Florists were sold out during the Easter season. An old established clothing house reports a 46% gain for the first quarter. The four largest motion picture theatres report average gains of 31½% and the Chamber of Commerce credits dealers of low priced cars with better than 100% increases, medium priced cars 33% up, and high priced cars, even.

The Westinghouse plant at 50% of capacity and Bosch at 75% are well above last year. Easter business was exceptionally good on luxury lines, jewelry stores reporting 150% increases and women's clothing stores 75%.

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The city government is in a very strong position, having just arranged a bond offering at the lowest rate in the past five years. Payroll figures from 60 manufacturing plants show an average increase in payroll of 83.2% in January and the payroll records of 300 concerns show an average increase of 22% in employment.

Worcester, Mass.

	City	Retail Area
Population	195,311	491,242
% U. S. A. ....	.159	.400
Retail Outlets	2,338	6,114
% U. S. A. ....	.151	.395
Income Tax Returns.....	8,500	16,359
% U. S. A. ....	.250	.482
Bank Debits (Jan.-Feb.).....	decreased -.6%	
Department Store Sales (Feb.).....	increased 56.6%	
Factory Employment (Jan.).....	increased 22.7%	
Factory Payrolls (Jan.).....	increased 51.0%	

Counties in area and % increase in new passenger car sales, '33 over '32—MASSACHUSETTS: Worcester, 33.9.

Current Business Situation

Worcester's basic industry, the metal trades, is showing steady improvement. Forty-three hundred employees of the American Steel Company represent a 100% increase in employment over last March and there is a 50% improvement at the Wickwire-Spencer plant. In all factories the number of people employed is near the 1929 level, although wages have not reached that stage. Typical grocery stores show a 22% improvement in business; drug stores, 18.7%; three leading department stores show an increase of 56.6%. The Woolworth and Kresge stores nearly doubled last year's business.

Chevrolet, Ford and Plymouth dealers report an average increase of 72.5%; Buick, Nash and Pontiac average increase is 32.5%; Cadillac and Packard report gains of 37.5%. Three large grocery wholesalers report increases as follows for the first three months—12%, 20% and 30%. The second largest tobacco and candy wholesaler in New England says that business for the year to date in the Worcester area is 25% to 40% ahead of last year. A leading clothing store reports that sales in their boy's department in March this year were better than any March sales in fifteen years.

The public utilities show substantial gains in new customers and in ability to collect bills. The Telephone Company reinstalled 250 phones the first fifteen days of March. Conditions in such tributary cities as Fitchburg, Leominster, Clinton and Gardner are very good, especially in textile, shoe and wire industries.

The city of Worcester floated a bond issue in New York early this month at the lowest rate of any municipal bond in recent years—proof that the city is in splendid financial shape.

Detroit, Mich.

	City	Retail Area
Population	1,568,662	2,539,750
% U. S. A.	1.278	2.061
Retail Outlets	17,169	27,284
% U. S. A.	1.108	1.761
Income Tax Returns.....	61,418	83,790
% U. S. A.	1.810	2.469
Bank Debits (Jan.-Feb.).....	increased 46.4%	
Department Store Sales (Feb.).....	increased 66.9%	
Factory Employment (Feb.).....	increased 116.0%	
Factory Payrolls (Feb.).....	increased 112.0%	

Counties in area and % increase in new passenger car sales, '33 over '32—MICHIGAN: Chippewa, 10.0; Huron, 26.6; Lapeer, -16.7; Livingston, 36.5; Luce, 23.1; Mackinac, 3.1; Macomb, 33.1; Oakland, 51.1; St. Clair, 60.0; Sanilac, 33.7; Shiawassee, 65.7; Tuscola, 54.4; Washtenaw, 26.1; Wayne, 40.4.

Current Business Situation

According to the preliminary estimate of Mr. Oliver Baker, statistician for the Detroit Board of Commerce, the industrial payroll in the Detroit area was 200% greater in March than the same month last year, while the number of industrial employees increased 157%. March department store sales were 98% greater than last year and building permits for the first half of the month were 151.2% higher than last year.

Wayne County registrations of new cars show increases as follows: 363.5%, low-priced cars; 251%, medium-priced cars; 105.5%, high-priced cars.

SALES MANAGEMENT

March lineage in Detroit newspapers show the following increases: Retail, 125.9%; general, 126.1%; classified, 90.4%; total, 119.3%.

It should be pointed out that the banking holiday for Detroit started February 14, 1933—so that Detroit was without banking facilities for 14 days in February and for the entire month of March. Thus the period covered in the preceding percentages represents today's business as measured against the lowest point in Detroit's business activity. The increase in business in other sections of the country has reacted in an extremely favorable way to Detroit in that the general upturn in motor car sales is largely concentrated in Detroit's production figures.

Wholesale outlet report the following percentage gains in dollar volume for March, 1934, over April, 1933. (April is taken as a more normal month than March.) Men's furnishings, 60%; dry goods, 50%; bakers' and confectioners' supplies, 40%; radios, 35%; electric refrigerators, 35%; groceries, 27%; electrical supplies (contractors), 26%; plumbing supplies, 25%; drugs, 18%; candy and tobacco, 15%.

The manager of the Retail Merchants Association has announced that retail sales in Detroit during March exceeded the level of two years ago for the first time since the depression. March passenger car sales in Wayne County totalled 7,114 units, as against 1,657 for March, 1933; 2,462 for March, 1932; 5,240 for March, 1931, and 7,852 for March, 1930.

The current index of business activity is approximately 97% of the years 1923-25, inclusive.

Detroit's industrial activity is not entirely automotive. Electric refrigeration, for example, is booming as never before. Universal Cooler Company recently received an order from Montgomery Ward for one million evaporators. A leading automobile body builder—Briggs—is stamping refrigerator cabinets, as well as automobile bodies.

Grand Rapids, Mich.

	City	Retail Area
Population	240,511	701,565
% U. S. A. ....	.196	.571
Retail Outlets	3,153	9,211
% U. S. A. ....	.204	.595
Income Tax Returns	7,113	13,805
% U. S. A. ....	.210	.407

	City	Retail Area
Bank Debits (Jan.-Feb.)	increased 1.5%	
Department Store Sales (Feb.)	increased 21.0%	
Factory Employment (Jan.-Feb.)	increased 65.6%	
Counties in area and % increase in new passenger car sales, '33 over '32—MICHIGAN: Allegan, -10.4; Antrim, 19.4; Barry, -2.8; Benzie, 50.0; Charlevoix, -3.0; Emmet, 46.6; Grand Traverse, 23.3; Ionia, 22.6; Kalkasha, 4.7; Kent, 31.1; Lake, -16.7; Seolau, 107.6; Manistee, 47.0; Mason, 8.5; Mecosta, -11.0; Missaukee, 14.3; Montcalm, 36.4; Muskegon, 45.0; Newaygo, 40.8; Oceana, 25.0; Osceola, 59.8; Ottawa, 17.9; Wexford, 51.8.		

Current Business Conditions

The dollar volume of business transactions in Grand Rapids for the three months ending February 1 increased 38.4% over the previous year.

Metal manufacturing showed the greatest group average increase—120% in volume of business and 80.2% in employment.

Furniture manufacturing showed an average 27.1% increase over the 1933-1932 period, and a 25.3% decrease compared with the 1932-1931 period. Employment in the furniture factories has increased 31.3% over a year ago.

The volume of wholesale business is not only well above last year's figure but is practically even with the volume two years ago.

Employment has also increased by 12.6% in the printing, engraving and paper industries.

Duluth, Minn.

	City	Retail Area
Population	101,463	280,827
% U. S. A. ....	.083	.229
Retail Outlets	1,286	3,106
% U. S. A. ....	.083	.200
Income Tax Returns	3,313	5,428
% U. S. A. ....	.098	.160

Counties in area and % increase in new passenger car sales, '33 over '32—MINNESOTA: Carlton, 61.2; Cook, -16.7; Itasca, 37.5; Koochiching, -8.3; Lake, 22.6; Lake of the Woods, -25.0; St. Louis, 33.3.

(Market Reports continued on page 383)

Up-to-Date Data on Department Stores Groups

Since publication in SALES MANAGEMENT in the issue dated September 1, 1932, of a chart showing the New York buying affiliations of the major department stores of the country, many executives have requested that we bring this information up-to-date. SALES MANAGEMENT has done so. On the three following pages are shown the department store memberships in each of eighteen groups.

On pages 380 and 381 we have charted memberships in the principal cities (roughly, the 100,000 group of cities), in convenient reference form. On page 382 are listed memberships of those among these same groups who have affiliated stores in smaller cities.

We point out here, as we did before, that there are only a handful of big stores which are unaffiliated with one of the New York central buying organizations: Carson Pirie Scott & Company and Mandel Brothers of Chicago, Best and Altman of New York, and Wanamaker—although Wanamaker has, of course, the buying power of two stores in New York and Philadelphia.

For those who are unfamiliar with the scope and setup of the major groups, we suggest reference to an article which appeared in SALES MANAGEMENT for December 12, 1931, entitled "Keys to a Four Billion Dollar Market."

Here four types of buying "machinery" in the department store field were commented upon:

First: there are the individually operated and owned stores who buy from road salesmen and periodically send their own buyers to the New York and Chicago markets.

Second: there are the stores that purchase buying service from resident buying offices in New York. Stores thus

served have no connection with other stores served by the buying concern, but they are able to obtain quantity prices due to the buying power represented there.

Third: there are the various groups of stores who, feeling the necessity of having more than a buying service rendered by an office not controlled by them, merged their efforts and set up a central organization in New York with proper capital structure to:

- Do research work.
- Do personnel work.
- Work out uniform methods of accounting.
- Exchange operating figures between stores.
- Study advertising methods and uniform selling plans.
- Perform a daily style service.
- Set up a central buying organization of specialists in each line to assist store buyers on their regular trips to the New York market, to buy for the store buyer when the buyer is not in the market, to organize the buying of merchandise where large volumes can be used to obtain price concessions, straight discounts, advertising allowances, or exclusive style features.

Fourth: there are those stores whose stock has been exchanged for the stock of a holding company, either privately or publicly held. In these cases the operations are practically similar to the operation of Class 3, only here there is financial central control.

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Eighteen Principal Retail Store Groups and T

CITIES	*American Retailers Inc. (Represented by Weill & Hartmann) 128 W. 31st St.	Assoc. D. G. Corp. of New York 17 E. 39th St.	*Assoc. Merchandising Corp. 1440 Broadway	*Frederick Atkins 11 W. 42nd St.	Cavendish Trad. Corp. 180 Madison Ave.	City Stores Company 132 W. 31st St.	Gimbel Bros. 116 W. 32nd St.	*Hahn Dept. Stores 1440 Broadway	*Kirby Block & Fischer 130 W. 31st St.
Akron				John G. Myers Hess Bros.				A. Polsky Co.	C. H. Yeager
Albany									
Allentown									H. Leh
Atlanta									Rich's Inc. (The Hub) (Hecht)
Baltimore		Stewart & Co.	Hutzler Bros. Co.	Hochschild, Kohn				O'Neill & Co.	Burger Phillips
Birmingham			R. H. White Co. Wm. Filene's Sons	R. H. Stearns		Loveman, Joseph & Loeb		C. F. Hovey Jordan Marsh	
Boston	Shepard Stores Gilchrist Co.		Abraham & Straus						
Bridgeport					Fred. Loeser				
Brooklyn				Flint & Kent					Jahraus Braun
Buffalo	E.W. Edwards & S.	Wm. Hengerer J. N. Adam			J. B. Ivey				
Canton									The Vogue
Charlotte									
Chattanooga									
Chicago	Wieboldt Stores Big Store		John Shillito Co. Wm. Taylor Son F. & R. Lazarus	H. & S. Pogue Halle Bros.				Rollman & Sons Co	
Cincinnati								Morehouse Martens Titche Goettinger	The Fashion
Cleveland									Johnston Shelton
Columbus									
Dallas					A. Harris				
Dayton	Elder & Johnston		Rike-Kumler Co.	Daniels & Fisher	Denver, D. G.				
Denver									Winkelman's Bros.
Des Moines	Yunker Bros.		J. L. Hudson Co.						
Detroit									
Duluth									
Elizabeth							Goerke-Kirch Co.		Levy Bros.
El Paso	Felix Brunschwig								Popular D. G.
Fall River									Cherry & Webb Co.
Flint									Smith-Bridgman Co.
Fort Wayne					Wolf & Dessauer				Rurode D. G.
Fort Worth									Monnig D. G.
Grand Rapids	Wurzburg D. G.								
Harrisburg								Herpolsheimer Co.	
Hartford				G. Fox & Co.					
Houston									Foley Bros.
Indianapolis	H. P. Wasson		L. S. Ayres	John Taylor D. G.					
Kansas City, Mo.									S.H. George & Sons
Knoxville									
Lincoln	Gold & Co.							Rudge & Guenzel	Pfeiffer Bros.
Little Rock									
Long Beach									Hirsch Merc.
Los Angeles	Broadway Dept. St.		Bullock's	J. W. Robinson Coulter D. G.		Kaufman-Straus B. Lowenstein & Br.			
Louisville		Stewart, D. G.			J. Goldsmith Burdine's E. Schuster & Co.				
Memphis			Boston Store Dayton Co.	T. A. Chapman			Gimbel Bros.	L. S. Donaldson	Minnesota Apparel
Miami		Powers Merc. Co.							
Milwaukee									
Minneapolis									
Nashville	Loveman Berger & Teitlebaum								
Newark		Mahne & Co.							Cherry & Co.
New Bedford									
New Haven									
New Orleans					D. H. Holmes Ch. A. Kaufman Stern Bros.	Maison Blanche	Gimbel Bros. Saks 5th Ave. Saks 34th St.		Hecht Bros. Altschul's Hale Bros. 2
New York City		Lord & Taylor James McCreery	Bloomingtondale Bros. H. C. Capwell Co.						John A. Brown
Norfolk									
Oakland	Capwell Sullivan & Furth Kerr, D. G. J. L. Brandeis			Thos. Kilpatrick				Quackenbush Co.	B. & M. Inc.
Oklahoma City									
Omaha									Grastonfield Co.
Patersen									
Peoria									
Philadelphia	Block & Kuhl		Strawbridge & Clothier Joseph Horne Co.	Pittsburgh Merc.	Kaufmann's	Lit Bros.	Gimbel Bros. Gimbel Bros.		Cherry & Webb
Pittsburgh									
Portland, Ore.									
Providence	Shepard Co.								
Reading									
Richmond									
Rochester									
Sacramento	E.W. Edwards & S. Weinstock Lubin		B. Forman Co.						Hale Bros.
St. Louis			Stix, Baer & Fuller						Schunemanns & Mannheimers
St. Paul									
Salt Lake City	Paris, D. G.				Auerbach Co.			Golden Rule	
San Antonio								Joske Bros.	
San Diego									
San Francisco			Emporium	Marston Co. O'Connor Moffatt					Hale Bros. Stores The Heinz Store Best's Apparel T. S. Martin
Scranton								Bon Marche	Hunters' Inc.
Seattle									
Sioux City	Davidson Bros.								
Spokane									
Springfield, Mass.									
Syracuse	E.W. Edwards & S.			Day Bros. & Co.					
Tacoma									
Tampa								Maas Bros.	Meis Bros. Co.
Terre Haute									
Toledo									
Trenton									
Tulsa	Vandever D. G. S. Kann Sons								Yards' Store Brown-Dunkin Hecht Co.
Washington					Lansburgh & Bros.				Rorabaugh D.G. Co.
Wheeling				Geo. Innes Co.					Kennard Pyle
Wichita									
Wilkes-Barre									
Wilmington									
Worcester									
Youngstown									

*For membership in smaller cities see page 382

²Whitthorne & Swan

Black & Sher
31st St.
ager
c.
D. (Hocht)
Phillips
Braun
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n Shelton
man's Bros.
es.
D. G.
& Webb Co.
ridgman Co.
D. G.
D. G.
ros.
orge & Sons
Bros.
Merc.
ota Apparel
& Co.
Bros.
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ros.²
l. Brown
M. Inc.
nfield Co.
& Webb
Bros.
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Bros. Stores
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Apparel
Martin
rs' Inc.
Bros. Co.
Store
-Dunkin
Co.
augh D.G.Co
ard Pyle

& Swan

3Callender, McAuslan & Troup

New York Affiliations of Department Stores in Smaller Cities*

Kirby, Block & Fischer

Amsterdam, N. Y. Holzheimer & Shaull
Anderson, Ind. The Fair Store
Asheville, N. C. Denton Co.
Atlantic City, N. J. M. E. Blatt Co.
Aurora, Ill. I. A. Ginsberg Est.
Austin, Tex. E. M. Scarbrough & Sons
Bakersfield, Cal. A. Weill, Inc.
Bangor, Me. Freese's
Baton Rouge, La. Rosenfield D. G. Co.
Binghamton, N. Y. Hills, McLean & Haskins
Bloomington, Ill. W. H. Roland Dept. Store
Bloomsburg, Pa. The Leader Store
Bluefield, W. Va. A. W. Cox Dept. Store
Boise, Idaho. The Mode, Ltd.
Bristol, Tenn. H. P. King Co.
Burlington, Vt. Abernethy, Clarkson, Wright, Inc.
Butte, Mont. The Symons D. G. Co.
Cedar Rapids, Ia. Armstrong Clo. Co.
Champaign, Ill. W. Lewis & Co.
Charleston, W. Va. The Diamond
Charleston, W. Va. A. W. Cox Dept. Store
Charlottesville, W. Va. A. W. Cox Dept. Store
Clarksdale, Miss. Powers & Co.
Clendenin, W. Va. A. W. Cox Dept. Store
Columbia, S. C. Kohn & Co.
Columbus, Ga. J. A. Kirven Co.
Columbus, Miss. Simon Loeb & Bros.
Corinth, Miss. A. Rubel & Co.
Council Bluffs, Ia. Krasne Bros. & Sons, Inc.
Covington, Va. A. W. Cox Dept. Store
Danville, Ill. Meis Bros., Inc.
Danville, Va. L. Herman
Davenport, Ia. M. L. Parker Co.
Du Bois, Pa. Leonardson Co.
Dunkirk, N. Y. The Safe Store
Emporia, Kans. Newman D. G. Co. of Emporia
Emporium, Pa. Alex Kay
Enid, Okla. Herbert Kaufman
Escanaba, Mich. The Fair Store
Evansville, Ind. De Jong's, Inc.
Ft. Dodge, Ia. Tuerke Merc. Co.
Freeport, Ill. Kutchback's
Fresno, Cal. R. & K. Co., Inc.
Galveston, Tex. Robert I. Cohen
Great Falls, Mont. Paris D. G. Co.
Greensburgh, Pa. S. W. Rose Co.
Greenville, Miss. Nelms & Blum
Gulport, Miss. Geo. E. Northrop
Hamilton, Ohio. Robinson-Schwenn Co.
Hattiesburg, Miss. Fine Bros.-Matison Co.
Helena, Mont. New York D. G. Co.
Hinton, W. Va. A. W. Cox Dept. Store
Hutchinson, Kan. The Wiley D. G. Co.
Indiana, Pa. Fisher Dept. Store, Inc.
Ithaca, N. Y. Rothschild Bros.
Jackson, Miss. R. E. Kennington Co.
Jamaica, L. I., N. Y. Burden & Co.
Johnsonburg, Pa. Alex Kay
Johnson City, Tenn. King's, Inc.
Joplin, Mo. Potlitzer Bros.
Lafayette, Ind. Loeb & Hene Co.
Lancaster, Pa. M. T. Garvin Co.
Lansing, Mich. J. W. Knapp Co.
Laurel, Miss. Fine Bros.-Matison Co.
Lawrence, Mass. Cherry & Webb Co.
Lexington, Ky. Denton Co.
Lima, Ohio. R. T. Gregg & Co.
Logansport, Ind. Schmitt-Kloepfer Co.
Lowell, Mass. Cherry & Webb Co.
Lynchburg, Va. C. M. Guggenheimer, Inc.
Madison, W. Va. A. W. Cox Dept. Store
Manitowoc, Wis. Schuette Bros. Co.
Marysville, Cal. Bradley's
Mason City, Ia. The Merkel Co.
Middletown, Ohio. John Ross Store
Minot, N. D. Ellison's
Moline, Ill. Brady-Waxenberg Co.
Montgomery, Ala. Nachman & Meertief
Morristown, N. J. M. Epstein, Inc.
Mt. Vernon, Ohio. J. S. Ringwalt Co.
New Castle, Pa. New Castle D. G. Co.
New Kensington, Pa. Silverman's Dept. Store
Newport News, Va. Nachman's Dept. Store
Niagara Falls, N. Y. Krausmann's
Nitro, W. Va. A. W. Cox Dept. Store
Norwalk, Ohio. L. M. Preis Co.
Oskaloosa, Ia. Alsop's
Oswego, N. Y. Geo. H. Campbell Co.
Owensboro, Ky. S. W. Anderson Co.

Owosso, Mich. D. M. Christian Co.
Paducah, Ky. E. Guthrie Co.
Paintsville, Ky. A. W. Cox Dept. Store
Parkersburg, W. Va. A. W. Cox Dept. Store
Pawtucket, R. I. David Harley Co.
Poplar Bluff, Mo. John F. O'Hara
Port Huron, Mich. J. B. Sperry Co.
Portsmouth, Ohio. Marting Bros.
Potsville, Pa. S. S. Weiss Est.
Ridgway, Pa. Alex Kay (Ladies Bazaar)
Riverhead, L. I., N. Y. Jacob Meyer, Inc.
Roanoke, Va. S. H. Heironimus Co.
Rome, Ga. The Fahy Store
Rosewell, N. M. Price & Co.
Saginaw, Mich. Wm. C. Wiechmann Co.
St. Albans, W. Va. A. W. Cox Dept. Store
St. Joseph, Mo. Potlitzer Bros.
Salem, Mass. M. H. Baker
Salina, Kan. Herbert Kaufman
San Jose, Cal. Hale Bros.
Santa Ana, Cal. Hirsh Merc. Co.
Sault Ste. Marie, Mich. Winkelman's Style Shop
Sault Ste. Marie, Mich. Bourke's Garment Shop
Savannah, Ga. Leopold Adler
Sharon, Pa. The Sharon Store
Spartanburg, S. C. Aug. W. Smith Co.
Springfield, Ill. Roland's
Springfield, Mo. Potlitzer Bros.
Springfield, Ohio. Ed. Wren Store
Stockton, Cal. Katten & Marengo, Inc.
Thomasville, Ga. L. Steyerman & Sons
Trinidad, Colo. H. Moses & Son
Tyler, Tex. Mayer & Schmidt
Utica, N. Y. D. Price & Co.
Waco, Tex. Goldstein Migel Co.
Waterbury, Conn. Samuel H. Greenberg
Watertown, N. Y. H. Ellis Dept. Store
Wausau, Wis. Winkelman's Dept. Store
Welch, W. Va. A. W. Cox Dept. Store
West Chester, Pa. J. B. Mosteller
Williamson, W. Va. A. W. Cox Dept. Store
Williamsport, Pa. Brozman's
Wooster, Ohio. H. Freeland & Co.
York, Pa. P. Weist's Sons

Weill & Hartmann

Alexandria, Minn. Herberger's
Alliance, Ohio. Erlanger Dry Goods Co.
Alpena, Mich. Cronin Co.
Beaver Falls, Pa. Smart Shop (Brody Bros.)
Berkeley, Cal. J. F. Hink & Son
Billings, Mont. Hart Albin Co.
Binghamton, N. Y. A. R. Schwartz & Co., Inc.
(Rosenbaum's)
Boise, Idaho. C. C. Anderson Co.
Bristol, Conn. Muzzy Bros.
Caldwell, Idaho. C. C. Anderson Co.
Charleston, W. Va. The Emporium
Clearfield, Pa. Chic Apparel (Brody Bros.)
Covington, Ky. John R. Coppin Co.
Daytona Beach, Fla. Yowell Drew Co.
Elmira, N. Y. { Rosenbaum's
 { The Marvel Shops (Rosenbaum's)
Emmett, Idaho. C. C. Anderson
Fayetteville, Ark. Boston Store D. G. Co.
Fort Smith, Ark. Boston Store D. G. Co.
Fresno, Cal. E. Gotschalk & Co., Inc.
Glen Falls, N. Y. Economy D. G. Co.
Grand Forks, N. D. Herberger's
Great Falls, Mont. Strain Bros.
Grand Island, Nebr. Middlebrook's
Greenville, S. C. Keith's, Inc.
Helena, Mont. Strain Bros.
Herkimer, N. Y. H. G. Munger & Co., Inc.
Hiawatha, Kan. Middlebrook's
Idaho Falls, Idaho. C. C. Anderson Co.
Indiana, Pa. Brody Bros.
Jamaica, L. I., N. Y. B. Gertz, Inc.
Johnstown, Pa. Penn Traffic Co.
Joplin, Mo. Oriental Shop
Kittanning, Pa. Joanne Shop (Brody Bros.)
Lansing, Mich. F. N. Arbaugh Co.
Massillon, Ohio. Erlanger D. G. Co.
Meadville, Pa. Crawford County D. G. Co.
Middletown, N. Y. Tompkins D. G. Co.
Nampa, Idaho. C. C. Anderson Co.
Niagara Falls, N. Y. Jones Bros.
Nyack, N. Y. Harrison & Dalley
Oil City, Pa. Joanne Shop (Brody Bros.)
Orlando, Fla. Yowell Drew Co.
Painesville, Ohio. Gail G. Grant & Co.
Paris, Ill. Jones Dry Goods Co.
Pueblo, Colo. C. C. Anderson Co.
Rutland, Vt. Economy Stores
St. Cloud, Minn. Herberger's

Topeka, Kan. Pelletier Stores
Twin Falls, Idaho. C. C. Anderson Co.
Uniontown, Pa. Wright Metzler Co.
Warren, Pa. Wright Metzler Co.
Washington, Pa. Caldwell Store, Inc.
Wausau, Wis. Heinemann Bros.
West Palm Beach, Fla. Hatch's, Inc.
York, Nebr. Middlebrook's

American Retailers, Inc.

(Represented by Weill & Hartmann)

Aurora, Ill. Block & Kuhl Co.
Decatur, Ill. Block & Kuhl Co.
Hollywood, Cal. Broadway-Hollywood
Joliet, Ill. Block & Kuhl Co.
Phoenix, Ariz. Korrick D. G. Co.
Pittsfield, Mass. England Bros., Inc.
Rockford, Ill. Block & Kuhl Co.
Rockford, Ill. Hess Bros. (Block & Kuhl Co.)
Waterbury, Conn. Howland Hughes

Syndicate Trading Company

Altoona, Pa. The Wm. F. Gable Co.
Pottsville, Pa. Pomeroy's, Inc.

Wm. T. Knott Company, Inc.

Augusta, Ga. J. B. White & Co.
Butte, Mont. Hennessy Co.
Montgomery, Ala. Montgomery Fair

Hahn Department Stores, Inc.

Butler, Pa. Alfred M. Reiber & Bro. (Br. of
 A. E. Troutman, Greensburg, Pa.)
Connellsville, Pa. A. E. Troutman Co.
 (Br. Troutman, Greensburg)
Du Bois, Pa. A. E. Troutman Co.
 (Br. Troutman, Greensburg)
Greensboro, N. C. The Meyers Co.
Greensburg, Pa. A. E. Troutman Co.
Indiana, Pa. A. E. Troutman Co.
 (Br. Troutman, Greensburg)
Jackson, Mich. L. H. Field Co.
Latrobe, Pa. S. P. Reed Co.
 (Br. Troutman, Greensburg)
Lake Charles, La. Muller Co., Ltd.
Lebanon, Pa. Louis Samler, Inc.
 (The Bon Ton)
Malden, Mass. F. N. Joslin Co.
Waterloo, Ia. James Black D. G. Co.

Frederick Atkins

Colorado Springs, Colo. Gidding's, Inc.
Evanston, Ill. Lord's
Hempstead, N. Y. Franklin Shops
Lowell, Mass. The Bon Marche D. G. Co.
Madison, Wis. Harry S. Manchester, Inc.
Phoenix, Ariz. Goldwaters Mercantile Co.
Poughkeepsie, N. Y. Luckey Platt & Co.
St. Joseph, Mo. Townsend, Wyatt & Wall
 Dry Goods Co.

Mutual Buying Syndicate, Inc.

Green Bay, Wis. H. C. Prange Co.
Lewiston, Me. B. Peck Co.
North Adams, Mass. Boston Store
Northampton, Mass. A. McCallum & Co.
Pittsfield, Mass. The Wallace Co.
Portland, Me. Porteous, Mitchell & Braun Co.
Poughkeepsie, N. Y. The Wallace Co.
Schenectady, N. Y. H. C. Prange Co.
Sheboygan, Wis. Prange-Washburn Co.
Sturgeon Bay, Wis. Prange-Washburn Co.

Foreign Department Stores Served By New York Buyers

Hamilton, Ont., Canada. Thos. C. Watkins, Ltd.,
 (Wm. T. Knott Co., Inc.)
London, England. Whiteley's (Associated Mer-
 chandising Corp.)
London, England. Selfridge & Co., Ltd.,
 (Assoc. Merc. Corp.)
London, England. Harrod's, Ltd.,
 (Assoc. Merc. Corp.)
Paris, France. Au Printemps,
 (Assoc. Merc. Corp.)
Montreal, Canada. Henry Morgan & Co., Ltd.,
 (Frederick Atkins)

*(Consolidated Stores, Inc.)

SALES MANAGEMENT

*For stores in larger cities affiliated with the eighteen principal retail store groups, see tables on preceding two pages.

Minneapolis, Minn. St. Paul, Minn.

	City	Retail Area
Population	735,962	2,531,708
% U. S. A. ....	.599	2.062
Retail Outlets	9,068	30,608
% U. S. A. ....	.585	1.976
Income Tax Returns.....	30,313	47,686
% U. S. A. ....	.893	1.405
Bank Debits (Jan.-Feb.).....	increased	24.2%
Factory Employment (Mar.).....	increased	17.6%
Factory Payrolls (Jan.).....	increased	16.3%

Counties in area and % increase in new passenger car sales, '33 over '32—MINNESOTA: Aitken, -14.1; Anoka, 10.3; Becker, 20.6; Beltrami, 10.7; Benton, -6.3; Big Stone, 42.6; Blue Earth, 61.6; Brown, 12.7; Carver, 16.5; Cass, 3.2; Chippewa, 66.7; Chisago, -7.8; Clay, 29.5; Clearwater, -20.9; Cottonwood, 69.7; Crow Wing, -7.3; Dakota, 34.4; Dodge, -35.3; Douglas, -8.1; Faribault, 68.3; Fillmore, 31.0; Freeborn, 33.9; Goodhue, 27.4; Grant, -19.4; Hennepin, 19.8; Houston, -28.4; Hubbard, -9.3; Isanti, 101.4; Jackson, 158.6; Kanabec, 45.2; Kandiyohi, 46.9; Kittson, 100.0; Lac qui Parle, 38.3; Le Sueur, 14.2; Lincoln, -13.5; Lyon, 74.8; Mahnomon, 84.8; Marshall, 5.9; Martin, 95.2; McLeod, 27.6; Meeker, 104.9; Mille Lacs, 2.4; Morrison, 3.9; Mower, 57.5; Murray, 23.8; Nicollet, 37.7; Nobles, 58.1; Norman, 14.9; Olmstead, 30.4; Ottertail, -14.6; Pennington, 45.8; Pine, 22.1; Pipestone, 33.0; Polk, 19.5; Pope, .0; Ramsey, 32.1; Red Lake, 70.0; Redwood, 40.0; Renville, 63.4; Rice, 8.5; Roseau, 59.3; Scott, -3.4; Sherburne, 29.8; Sibley, -1.0; Stearns, -4.2; Steele, -6.4; Stevens, -8.6; Swift, 11.1; Todd, -10.1; Traverse, 11.4; Wabasha, 31.4; Wadena, 42.4; Waseca, 44.4; Washington, 20.7; Watonwan, 42.4; Wilkin, 33.3; Winona, 37.1; Wright, 9.5; Yellow Medicine, 33.0. WISCONSIN: Buffalo, -6.6; Dunn, -13.4; Eau Claire, 11.5; Pepin, -8.9; Pierce, 17.6; Polk, .0; St. Croix, 11.7; Trempealeau, -26.3. NORTH DAKOTA: Richland, -23.6. SOUTH DAKOTA: Day, 9.5; Grant, -4.3; Marshall, 34.1; Roberts, 3.1.

Current Business Conditions

Jobbers operating in the vast area served from the Twin Cities report uniform gains in business.

Reinhard Brothers Company, distributors of Atwater Kent radios and Norge refrigerators, report combined February-March sales over last year as being 12½% greater for Atwater Kent; 35% greater for Norge. The Graybar Electric Company billings in February and March average 17½% better than last year; the A. F. Stuefer Company, Inc., General Electric distributors, had a 5% gain in February, a 45% gain in March; the Griggs-Cooper company, grocery jobbers, report a 43% upturn; the Northwestern Drug Company a 21% gain in January, 33½% in February, 26% in March—with 75% increase coming from country territory.

MINNEAPOLIS: A group of typical grocery stores—both chains and independents—surveyed by the Ross investigators, showed uniform increases ranging from 10% to 22% in March. Drug store gains range from 10% to 42%, with Walgreen averaging 24.6% ahead of last year.

Sears, Roebuck department store jumped its sales 42%; L. S. Donaldson, 30%.

March business of the Kennedy Chevrolet Company was 75% better than last year, and a leading Ford Agency reported a 35% gain. Some leading agents of medium-priced and high-priced cars were not in business last year, and have no comparable sales, but report business as being very satisfactory.

The Federal Reserve agent of the Ninth District estimates that agricultural income in the Twin Cities retail area is approximately 11% greater than last year and that this figure will be greatly increased by farm loan and acreage payments from the Government during 1934.

ST. PAUL: Ross investigators found that grocers reported uniform gains ranging from 5% to 15% in March over last March, while gains of druggists ranged from 9% to 20%.

Bannon's department store had a 12% increase; the Emporium 10%.

A Ford agent, Central Garage, says business is 33½% better, while Midway Chevrolet points to 30% gain. The St. Paul Nash Motors find business 200% better than last year; while the leading Buick distributor has a 50% increase. Cadillac's business in March was up 20%; Packard reported a decline.

Eighteen hundred men are currently employed at the Armour plants; 1,800 at Swift & Company; 700 at Brown & Bigelow; 600 at the Waldorf Paper Box Company.

APRIL 20, 1934

Kansas City, Mo.

	City	Retail Area
Population	399,746	2,327,576
% U. S. A. ....	.326	1.896
Retail Outlets	6,188	31,264
% U. S. A. ....	.399	2.018
Income Tax Returns.....	15,436	38,100
% U. S. A. ....	.455	1.123
Bank Debits (Jan.-Feb.).....	increased	12.8%
Department Store Sales (Feb.).....	increased	12.8%
Factory Employment (Jan.).....	increased	10.0%
Factory Payrolls (Jan.).....	increased	10.0%

Counties in area and % increase in new passenger car sales, '33 over '32—MISSOURI: Barton, -13.8; Bates, -12.3; Caldwell, 19.3; Carroll, 80.6; Cass, -5.6; Cedar, -19.3; Chariton, 18.0; Clay, 8.3; Clinton, 2.9; Daviess, -18.0; Grundy, 16.7; Henry, -.8; Howard, 6.3; Jackson, 20.6; Johnson, -10.6; Lafayette, 11.1; Linn, 29.4; Livingston, 56.3; Mercer, -16.0; Pettis, 58.4; Platte, 67.4; Putnam, 18.6; Ray, 86.7; St. Clair, 3.8; Saline, 69.9; Sullivan, 4.4; Vernon, 68.5. KANSAS: Allen, 101.9; Anderson, 65.8; Atchison, 34.2; Barton, 38.0; Bourbon, 105.9; Brown, 95.7; Chase, 116.7; Chautauqua, 89.6; Cheyenne, 73.3; Clay, 64.2; Cloud, 77.5; Coffey, 64.6; Crawford, 74.4; Decatur, -22.2; Dickinson, 58.2; Doniphan, 63.3; Douglas, 47.3; Ellis, 56.4; Ellsworth, 58.3; Finney, 31.2; Franklin, 69.9; Geary, 73.9; Gove, 50.0; Graham, 57.8; Greeley, -28.6; Jackson, 17.9; Jefferson, 61.7; Jewell, 93.2; Johnson, 66.7; Labette, 82.7; Lane, -16.7; Leavenworth, 34.6; Lincoln, 28.6; Linn, 62.8; Logan, 60.0; Lyon, 69.3; McPherson, 82.3; Marshall, 70.1; Miami, 72.8; Mitchell, 169.8; Montgomery, 95.5; Morris, 55.6; Nemaha, 71.4; Neosho, 85.6; Ness, 24.5; Norton, -27.3; Osage, 14.6; Osborne, 85.9; Ottawa, 186.3; Phillips, 23.6; Pottawatomie, 67.2; Rawlins, 70.3; Republic, 78.3; Riley, 68.8; Rooks, 30.5; Rush, -24.7; Russell, 76.3; Saline, 75.6; Scott, .0; Shawnee, 76.4; Sheridan, 105.6; Smith, 92.2; Thomas, 16.3; Trego, 90.2; Wabaunsee, 136.3; Washington, 45.1; Wichita, -61.1; Wilson, 50.0; Woodson, 96.6; Wyandotte, 71.1. OKLAHOMA: Craig, -2.4; Nowata, 38.8; Washington, 79.9.

Current Business Conditions

Employment and payroll conditions have vastly improved in the past year. For the following companies we give the number of persons now employed, followed by the percentage of increase over the preceding year. Payrolls in most of these companies have increased even more than employment.

Ford Motor Company, 2,100—10%; Sheffield Steel, 1,300—20%; Phillips Petroleum, 325—40%; Richard & Conover, 30—20% Fisher Body Company, 1,400—10%; Kansas City Power & Light Company, 1,800—2%.

For the first fifteen days in March, building contracts awarded jumped 300% over the last year figure.

A group of typical grocery stores shows an 11% increase; a group of independent and drug chains is 9% up; the Peck's department store was 20% better off in March, and the Jones Store, 15%.

Four leading moving picture theatres had an average gain of 11.25%

The DeWitt Chevrolet Company improved its business 20%; the Kelley Rippert Ford Company, 30%; and Nash, Buick, Cadillac and Packard reported gains of from 5 to 15%.

Transportation receipts have shown consistent increases in recent months. Much activity is expected from the opening of waterway traffic between St. Louis and Kansas City; St. Joseph, Missouri, will contribute considerable water traffic.

A tremendous attendance is expected for the Elks' convention to be held soon.

St. Louis, Mo.

	City	Retail Area
Population	821,960	2,835,162
% U. S. A. ....	.669	2.309
Retail Outlets	12,571	36,105
% U. S. A. ....	.811	2.331
Income Tax Returns.....	37,332	62,856
% U. S. A.	1.100	1.852
Bank Debit (Jan.-Feb.).....	increased	7.4%
Department Store Sales (Feb.).....	increased	22.9%
Factory Employment (Jan.).....	increased	6.2%
Factory Payrolls (Jan.).....	increased	7.4%

Counties in area and % increase in new passenger car sales, '33

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over '32—MISSOURI: Adair, -16.1; Audrain, 50.0; Benton, -37.3; Bollinger, 31.8; Boone, 5.8; Butler, 2.7; Callaway, 15.8; Cape Girardeau, 29.8; Carter, 90.0; Clark, 25.9; Cole, 55.7; Cooper, 22.4; Crawford, -32.4; Dent, -16.1; Dunklin, 42.6; Franklin, -2.5; Gasconade, -17.2; Iron, 10.0; Jefferson, 39.7; Knox, 19.5; Lincoln, 19.2; Macon, 3.3; Madison, 29.9; Maries, -25.9; Marion, -4.9; Miller, -16.0; Mississippi, -15.5; Moniteau, -21.3; Monroe, -8.7; Montgomery, -30.0; Morgan, 2.0; New Madrid, 13.2; Osage, -24.5; Pemiscot, 5.2; Perry, 7.4; Phelps, 3.9; Pike, 1.2; Ralls, -16.2; Randolph, 31.4; Reynolds, -21.4; Ripley, 13.3; St. Charles, 33.9; St. Francois, -16.7; St. Louis, 30.7; St. Genevieve, 58.1; Schuyler, -27.8; Scotland, 22.5; Scott, 16.7; Shannon, 22.7; Stoddard, 3.1; Warren, -7.3; Washington, 59.5; Wayne, 30.8; St. Louis City, 16.4. ARKANSAS: Clay, 29.6. ILLINOIS: Alexander, 3.4; Bond, -13.9; Calhoun, -6.2; Clay, 3.1; Clinton, 28.1; Franklin, 32.6; Hardin, 175.0; Jackson, 13.4; Jefferson, 32.4; Jersey, 45.7; Johnson, 4.3; Lawrence, -2.8; Madison, 28.8; Marion, 10.1; Monroe, 9.8; Montgomery, -4.9; Perry, 28.9; Pike, 31.2; Pope, 121.4; Pulaski, 35.6; Randolph, 13.8; Richland, 59.4; St. Clair, 10.6; Union, 28.6; Washington, 9.9; Williamson, 43.0.

Current Business Situation

March payrolls, according to an estimate by the St. Louis Chamber of Commerce, increased 11% in March over the same month last year, and agricultural income 26%. Building contracts in the first 15 days of the month were 47% above last year.

March sales of the Scruggs-Vandervoort-Barney store were 20% better than last year, while Famous-Barr improved its business 35%. A check of typical grocery stores showed that four-fifths of them had better business with gains ranging from 5% to 20%. Drug stores range from no change to gains of 25%. Typical motion picture exhibitors reported gains of from 5% to 15%.

March business of South Side Chevrolet gained 55% over last year. The Chambers Motor Company (Ford), 200%; A. R. Lindburg Company (Studebaker), 120%; South Side Buick, 50%; Oliver Cadillac Company, 40%; Lincoln Retail Division, 50%.

Postal receipts of the St. Louis Post Office were identical with the same month last year despite the reduction in the local postage rate from 3 cents to 2 cents. The reports of the Terminal Railroad Association of revenue cars interchanged at the St. Louis Gateway show an increase of 17% in the month of February, and for the first time in five years February tonnage shows an increase over January. February figures of the Union Electric Light & Power Company show that the February output of its plants in the St. Louis area increased 10.5% over February, 1933.

Omaha, Neb.

	City	Retail Area
Population	214,006	1,285,679
% U. S. A. ....	.174	1.047
Retail Outlets	2,663	16,026
% U. S. A. ....	.172	1.034
Income Tax Returns.....	9,497	21,444
% U. S. A. ....	.280	.632
Bank Debits (Jan.-Feb.).....increased	20.2%	
Department Store Sales (March).....increased	17.0%	
Factory Employment (Jan.).....increased	5.0%	
Factory Payrolls (Jan.).....increased	6.0%	

Counties in area and % increase in new passenger car sales, '33 over '32—NEBRASKA: Adams, 33.3; Antelope, 30.0; Arthur, 100.0; Banner, 133.3; Blaine, 100.0; Boone, 1.4; Box Butte, 131.8; Boyd, -14.8; Brown, 90.0; Buffalo, 24.4; Burt, -1.0; Butler, 130.0; Cass, 90.0; Chase, 34.5; Cherry, 14.0; Cheyenne, 15.3; Clay, 10.3; Colfax, 1.0; Cuming, -5.4; Custer, 23.0; Dawes, 14.7; Dawson, 87.1; Deuel, 15.0; Dodge, 62.4; Douglas, 43.6; Frontier, 15.0; Furnas, -28.6; Garden, 63.3; Garfield, -51.9; Gosper, -50.0; Grant, 12.5; Greeley, -22.2; Hall, 80.8; Hamilton, 19.6; Hayes, -10.0; Hitchcock, 18.1; Holt, 14.3; Hooker, -50.0; Howard, 78.0; Kearney, 65.8; Keith, 300.0; Keyapaha, 85.7; Kimbald, 222.7; Knox, 8.8; Lincoln, 101.9; Logan, -38.5; Loup, .0; McPherson, 66.1; Madison, 45.1; Merrick, 77.6; Morrill, 59.3; Nance, 58.5; Nemaha, 219.3; Otoe, 126.8; Perkins, 512.5; Phelps, 27.1; Pierce, .0; Platte, 87.6; Polk, 123.3; Redwillow, 36.6; Richardson, 127.8; Rock, 15.0; Sarpy, -13.9; Saunders, 29.3; Scotts Bluff, 78.4; Sheridan, 25.3; Sherman, 60.0; Sioux, 100.0; Stanton, -29.6; Thomas, .0; Thurston, 104.1; Valley, 16.1; Washington, 41.4; Wayne, -3.1; Wheeler, 350.0; York, 50.0. IOWA: Fremont, 82.9; Harrison, 52.0; Mills, 34.0; Montgomery, 55.4; Page, 123.0; Pottawattamie, 43.0; Shelby, 29.8. SOUTH DAKOTA: Bennett, -20.0; Gregory, -22.2; Shannon, 17.4; Todd, -25.0; Washabaugh, .0; Washington, -66.7.

Current Business Conditions

Employment in the Omaha district has vastly improved in recent months. The 14,929 workers employed by the Union Pacific Railway represents an increase of 11% in numbers and 13% in payrolls. The Cudahy Packing Company is employing 13% more men and paying out 17% more in wages.

The Chamber of Commerce estimates that the current payrolls of all industries in Omaha is 12% ahead of last year, and the Federal Land Bank is authority for the statement that the agricultural income in the Omaha area is 22% greater than last year.

A group of selected grocery stores surveyed by Ross investigators showed average gains of about 14% the first half of March, with no decreases shown.

Reports from druggists were more spotty, but with the majority showing increased sales.

Business currently at Kilpatrick's Department Store is up 20%; and at Brandeis, 14%.

The Packard distributor reports a 15% gain; Buick, 30%; Hudson, 45%; Ford, 10%; Chevrolet, no change.

Building permits, due the first half of March, increased 59% over last year.

The Federal Government is a very definite aid in the Omaha area because of the actual cash which was sent in through crop loans and through the activities of the Federal Land Bank. Farmers are praying for a wet spring to counteract the winter lack of moisture for their crops of winter wheat.

Newark, N. J.

	City	Retail Area
Population	442,337	2,819,211
% U. S. A. ....	.360	2.296
Retail Outlets	7,153	39,968
% U. S. A. ....	.462	2.580
Income Tax Returns.....	18,579	147,443
% U. S. A. ....	.547	4.344
Bank Debits (Jan.-Feb.).....decreased	8.2%	
Department Store Sales (Jan.).....increased	8.2%	
Factory Employment (Feb.).....increased	2.7%	
Factory Payrolls (Feb.).....increased	5.5%	

Counties in area and % increase in new passenger car sales, '33 over '32—NEW JERSEY: Essex, 13.0; Hudson, 10.9; Morris, 9.5; Union, 27.5; Middlesex, 20.7; Bergen, 20.2; Passaic, 19.5.

Current Business Conditions

Increased employment and payrolls in the Newark retail area have speeded up the distribution of home equipment. The distributor of General Electric refrigerators, for example, reports that first quarter sales were 50% better than last year; Leonard refrigerator sales materially improved during February and March, as compared with the same months last year; Apollo Radio Company, distributors of Crosley refrigerators in Northern New Jersey, Orange and Rockland counties, New York, reported sales up 900% for the first quarter, and earlier this month they placed an order for immediate shipment with the Crosley Company for forty solid carloads of refrigerators—the largest order ever received by the manufacturing company.

Krich Distributing Corporation, RCA distributors, report a 5% increase for the first quarter; Philco Radio & Television Company, likewise reported better business; sales of Crosley radios in the area were 20% ahead for the first quarter, and distributors of Atwater Kent and General Electric radios report improvement.

Both drug wholesalers and retailers report increases averaging approximately 10% in dollar volume. A cut-rate drug store on Broad Street reports a 20% decrease in business, but a neighboring store on the same street points to a 22% increase.

Retail merchants in several lines told the Ross investigator that profit margins were better because NRA codes eliminate ruinous price competition.

Fifty per cent of the grocers called upon by the Ross investigator reported increases—ranging from 10% to 25%; a fourth reported no change; the other fourth, slight decreases. The Newark Evening News estimates that the dollar volume of food sales for February and March was 12% to 14% ahead of last year, but that the tonnage showed a slight decrease.

A Ford dealer reported a 100% increase. One of the largest distributors of used cars said that the first quarter's business was about even with last year, but that it was picking up and the last week in March was 50% better than last year. Reo Motors on Central Avenue reported a 30% increase; Buick-Pontiac agency says that business is more than 100% better; LaSalle-Cadillac agency reports an 18% increase.

April pay increases in the Newark area include 10% at the Kearny plant of Congoleum-Nairn; 10% to the 1,500 employees of

the Crucible Steel Company; 10% to the 400 employees of the Edgewater plant of the Corn Products Refining Company.

The Newark-Harrison area showed an increase in employment from 42,465 in January to 43,192 in February—a gain of 1.7%, and the payroll increase in the same plants was 4.1%. As compared with February, 1933, employment in that area gained 29.5% and payrolls gained 36%.

Albany, Troy and Schenectady, N. Y.

	City	Retail Area
Population (3 cities)	295,867	875,099
% U. S. A.	.241	.713
Retail Outlets	4,475	13,475
% U. S. A.	.289	.870
Income Tax Returns	14,172	26,283
% U. S. A.	.417	.774

Countries in area and % increase in new passenger car sales, '33 over '32—NEW YORK: Albany, 12.7; Clinton, -3.3; Columbia, 17.4; Essex, 7.9; Fulton, 20.4; Greene, 15.1; Montgomery, 17.9; Rensselaer, 21.4; Saratoga, 15.9; Schenectady, 47.4; Schoharie, 7.8; Warren, 9.8; Washington, 16.6.

Current Business Situation

Factory employment in the three cities gained 4.9% in March over February, and payrolls increased by 11.6%. These advances raised the tri-city index figures, based on the 1925-27 average as 100, to 60% for employment and 49.4% for payrolls, and extended the gains since a year ago to 27.6% and 47.4% respectively.

Average weekly earnings were \$23.92 in March against \$20.71 a year ago.

The upturn in Troy has been especially marked. Nearly all of the 390 men employed at the Ford plant benefit by restoration of the \$5 a day minimum wage, and the ten Troy brush factories, employing 1,500 workers, will benefit by improved hour and wage conditions brought about by NRA. Approximately 1,000 men in the Ludlum Steel Company plants received a 10% wage increase the first of the month.

Federal income tax collections for the Troy area show an advance of \$685,645 in the first twenty days returns—the first advance in many years.

Troy percentage of delinquent taxes is only 5.4%, making it the first of 154 cities of under 250,000 in tax collections.

Easter business was on a par with Christmas buying, and one of the leading stores reported one March day's business to be four-fifths of the total of business done in the store for the entire month of March, 1933.

Payrolls and employment are now at the highest level since 1931, and during March the increase in wage earners in the Troy area was second highest in the state.

Buffalo, N. Y.

	City	Retail Area
Population	573,076	1,294,505
% U. S. A.	0.467	1.054
Retail Outlets	9,786	19,612
% U. S. A.	0.632	1.266
Income Tax Returns	26,363	45,684
% U. S. A.	0.777	1.346

Bank Debits (Jan.-Feb.)	increased	3.4%
Department Store Sales (Feb.)	increased	11.4%
Factory Employment (Feb.)	increased	40.0%
Factory Payrolls (Feb.)	increased	57.4%

Countries in area and % increase of passenger car sales, '33 over '32—NEW YORK: Allegany, 44.2; Cattaraugus, 27.9; Chautauque, 9.2; Erie, 21.7; Genesee, -5.4; Niagara, 49.4; Wyoming, 19.1. PENNSYLVANIA: McKean, 31.5; Potter, 33.0.

Current Business Situation

As compared with a year ago, leading Buffalo employers have increased their forces all the way from 21% to 143%. Beth-

APRIL 20, 1934

Wouldn't IT BE A CINCH THO?

• There's many a sales manager who wishes every market he tackled was as easy as Newark. Somewhat like wishing for the moon, of course, but then you can't blame a fella for wishing.

• Newark, as a market, might be paralleled to a very fine piece of furniture. No matter how old it becomes, a little bit of polish plus some elbow grease and presto! . . . it's brand new again. It isn't surprising earliest signs of real honest-to-goodness business should appear in Newark. Look over the reports. Pretty good, huh? And when you stop to consider Newark's industries never DID hang out the "for rent" sign, a 29.5% employment gain is to be saluted respectfully. It's the diversification.

• But what about this restored purchasing power? Do your charts show you are getting your share? Perhaps the sales table needs some advertising polish. Let The Newark Evening News supply the energy and see the lustre come back. Eight out of ten English-speaking families in Metropolitan Newark read it. Coverage is concentrated right where it should be . . . smack in the choicest spot in North Jersey. And right where it will do most good.

• Do you realize what a cinch it is to cover this market? . . . what a cinch it is to sell it, providing you choose The Newark Evening News to do the job? Simple as abc because the market buys through this medium. How can it help but click? There aren't many markets—important, key markets, mind you—where one medium, one ad schedule, one cost wraps it up for you. That's why sales and advertising managers and space buyers wish there were more cinches like this one.

Newark Evening News . America's Leading Week-day Newspaper

215-221 Market Street, Newark, New Jersey,
EUGENE W. FARRELL, Business and Advertising
Mgr.; O'MARA & ORMSBEE, General Repre-
sentatives, New York, Chicago, Detroit, San
Francisco, Los Angeles.

lehem Steel, DuPont, Republic Steel, Chevrolet, Ford and Houck now employing 17,700 men; Ford, with its 1,800 employees, was not operating last year.

The average March increase in ten typical grocery stores, including both chain and independent, was 12.3%. Ten representative drug stores increased 12.7%; February sales for the five largest department stores increased 11.4%.

Four automobile agencies in the low-price field had an average increase of 97.5%—with the lowest increase, 45%; the highest 125%. Buick, Dodge and Hudson dealers had an average increase of 80%; Packard, Lincoln and Cadillac increased, on the average, 86.6%.

Distributors of radios and washing machines had an average increase of 10%, while McKesson & Robbins' business was up 20%, and Weed & Company (hardware) jumped 150%.

Building permits in the first half of March were up 13½%.

The financial editor of a leading paper estimates the total increase in payrolls as 40% over last year. Employment figures in 35 plants, large and small, show the following increases in employment for the first two weeks of March, compared with the same weeks last year; metal manufacture, 50%; consumers of metals, 100%; producers of specialties, 30%.

The local Chevrolet plant has just opened a new department, employing 400 additional men; Trico Products, makers of windshield wipers, are running three shifts a day. Many important building projects are in view for later in the Spring. Consumption of electric power, coal and gas has increased about 30% over last year.

On April 1, 15,400 workers in Buffalo's steel floor and automotive industries received wage increases approximating 10%. Payroll gains for New York State in the period from January 15 to February 15 were 6.2%; for Buffalo, 8.3%.

Advertising in three Buffalo daily and two Sunday newspapers for the week ending March 25 increased 48% over the same 1933 week.

New York, N. Y.

	City	Retail Area
Population	6,930,446	12,081,459
% U. S. A.	5.645	9.840
Retail Outlets	103,623	180,234
% U. S. A.	6.689	11.634
Income Tax Returns	476,301	723,106
% U. S. A.	14.033	21.305
Bank Debits (Jan.-Feb.)	increased 11.5%	
Department Store Sales (Jan.)	increased 12.6%	
Factory Employment (Jan.)	increased 4.4%	
Factory Payrolls (Jan.)	increased 7.5%	

Counties in area and % increase in new passenger car sales, '33 over '32—NEW YORK: Bronx, 9.0; Dutchess, 14.2; Kings, 11.6; Nassau, 24.2; New York, 10.9; Orange, 10.0; Putnam, 8.5; Queens, 11.6; Richmond, 15.5; Rockland, 22.6; Suffolk, 15.7; Sullivan, -1.3; Ulster, 8.3; Westchester, 31.5. NEW JERSEY: Bergen, 20.2; Essex, 13.0; Hudson, 10.9; Hunterdon, 11.2; Mercer, 22.1; Middlesex, 20.7; Monmouth, 18.9; Morris, 9.5; Ocean, -1.1; Passaic, 19.5; Somerset, 17.7; Sussex, 4.9; Union, 27.5; Warren, 37.9. CONNECTICUT: Fairfield, 32.5.

Current Business Conditions

Department stores sales in the Metropolitan area are rising steadily. During the first two weeks of March the advance over the corresponding period last year was 36% or 33% excluding liquor. While this remarkable rise is attributable partly to the 1933 bank holiday, still it indicates a more than seasonal improvement and is only 2% short of 1932. During February the total Metropolitan sales were 7% above last year.

New York people are paying their bills more promptly as Spring progresses. Dun & Bradstreet report March collections for New York City 75% better than March of last year and 50% better than last June.

Grocery store sales are somewhat on the upgrade. Estimates by wholesalers show increases of from 15% to 25% in dollar volume for the first quarter over the same period of 1933. Price advances account for the larger share of this increase, but tonnage figures are thought to be at least 4% above last year. Among wholesalers, Seeman Brothers find their dollar volume between 20% and 25% up; R. C. Williams Co. nearly as high.

Electrical appliances are moving in steadily increasing volume. Rex Cole, Inc., reports first quarter sales of G-E refrigerators, washers, ironers and cleaners 40% up. Radio sales are rising at higher prices. Auto radios are showing greater popularity.

New car registration for the first three weeks of March totaled 4,975 as compared with 3,721 in the comparable three weeks last year. The final 10 days of the month had not been tabulated

when this was written, but principal distributors agreed that this period probably added 3,000 more sales which would raise the March total to about 8,000 cars. In March, 1933, sales were only 6,451.

New York City factories showed activity during March even greater than those of the State as a whole. Equipment improved 4.5% over February and payrolls 8.7%.

New York's hotels are running far ahead of the national average in both room sales and meals served. Room sales during the first quarter were 24% and restaurant sales 71% ahead of last year. National averages were 16% and 51%.

Building contracts let in the metropolitan district are steadily increasing. March totals were \$30,000,000 compared with barely \$13,000,000 last March. During the full first quarter contracts totaled \$52,000,000 as against \$44,000,000 for the same quarter a year ago.

Metropolitan newspaper lineage reflects the definite business improvement in New York. Advertising totals for the city dailies show a 15% advance over the first quarter of 1933 and the 31% March upward trend continued into April. Brooklyn papers advanced 13% for the quarter and nearly 23% for March.

Westchester County, N. Y.

	Retail Area
Population	520,947
% U. S. A. ....	.424
Retail Outlets	7,127
% U. S. A. ....	.460
Income Tax Returns	28,665
% U. S. A. ....	.845
Counties in area and % increase in new passenger car sales '33 over '32—Westchester County, 31.5.	

Current Business Conditions

Gains ranging up to 50% in business volume, accompanied by consequent increases in payrolls and number of employees are shown in the survey of Westchester County industries for the first quarter of 1934, as compared with the same period of 1933.

Yonkers, the county's largest city and its principal industrial center, reports improved conditions in concerns large and small. Its leading industry, the Alexander Smith & Sons Carpet Company, shows an increase of sales volume for the quarter of between 30% and 40% (a March increase of 50%) and in a year's time its weekly payroll is said to have jumped from \$25,000 to \$100,000.

Another large Yonkers plant, the Habirshaw Wire & Cable Company, reports business, payrolls and number of employees 50% ahead, and the Otis Elevator Company's Yonkers payroll is 12% higher, and 1,400 are on the payroll now.

Similar increases are true at the large hat companies, such as the Dalton Hat Company and the Bernard Greenberg Company, and two large chemical companies—the Arlington Chemical Company, Yonkers, and the Burroughs-Welcome Company of Tuckahoe.

Wholesale grocers operating in the Yonkers area report slight increases, as do the chain druggists and some of the independents. The manager of Genung's Department Store said that the week ending April 14 was their best week in eleven months.

A check-up of automobile dealers in Yonkers showed a 33⅓% gain for Chevrolet; 15% for Plymouth; 50% for Ford, and 25% for the Packard-Westchester Company.

In Mount Vernon three major industries led their 1933 first quarter figure by 5% or better, and in the 33 garment shops, which comprise the city's largest industry in number of plants, first quarter business improved between 7% and 10%.

The Chevrolet and associated automotive plants which are the industrial backbone of Tarrytown report doubled figures in employment and payrolls. Chevrolet has 2,750 men at work as compared with 1,050 last year; Fisher Body has 2,755 as against 1,461 last year.

Port Chester reports a general increase of 50%. Its largest plant, the Russell, Birdsall & Ward Bolt & Nut Company, has most departments working twenty-four hours daily. Several other factories report capacity operations, notably in the clothing industry, and one with 600 workers has twice the number who were at work in 1933. Improvement in number of personnel and in payroll is reported also by the big Life Saver plant in Port Chester.

While there is relatively little new private building in the county, modernization and remodeling continues active, and brokers report a scarcity of houses to rent in the \$100 to \$175 class. Both sales and rentals are well ahead of last year.

Commercial banks in Westchester County recouped, during the first quarter of 1934, nearly all of their losses in deposits suffered during 1933.

"Extraordinary success... continuous cooperation!"

TELEPHONE ME LACON 3-1172
3-1173

B. MEIER & SON, Inc.
FOOD PRODUCT MANUFACTURERS' AGENTS
534 WESTCHESTER AVE.
NEW YORK CITY
March 21, 1934.

SALES MANAGEMENT,
420 Lexington Ave.,
New York City.

Gentlemen:

I read with interest and appreciation the articles which appeared in the March 15th issue of SALES MANAGEMENT on Redit-Spred, Pate de Foie.

While you sing the praises of B. Meier & Son and their merchandising efforts, due credit should have been given also to the Westchester Group of Newspapers, whose advertising department has been ever ready to co-operate with us. Many new ideas, suggestions and novel points of view emanating from their offices were most helpful. In fact, we believe the success of this product would not have been so extraordinary without the continuous interest and co-operation of this group of papers.

Sincerely yours,
Edwin F. Meier
Edwin F. Meier.

R. R. SIDING

1

TRUCKING FACILITIES

WAREHOUSING

TEN LEADING NEWSPAPERS 6-DAY EDITIONS YEAR 1933	
Retail Grocery Lineage	
Authority Media Records, Inc.	
*New Rochelle Standard Star	1,097,177
Pittsburgh Press	1,092,580
*White Plains Reporter	956,574
Akron Beacon Journal	934,604
Hartford Times	900,887
*Mount Vernon Argus	883,808
Chicago Daily News	869,864
Memphis Commercial Appeal	866,103
Pittsburgh Sun Telegraph	864,315
Washington Star	862,824

* A member of the Westchester County Publishers, Inc., Group.

Another unsolicited endorsement of our service, which reached our office through Sales Management. (A reprint of the articles mentioned in the letter sent to you on request.)

1st, 3rd and 6th, among the Nation's Leading Newspapers (6 day) in Retail Grocery Lineage!

During 1933 the New Rochelle Standard Star led all of the Nation's 6-day newspapers in total volume of retail grocery lineage. Two more of the Westchester County Publishers Group papers, the White Plains Reporter and the Mount Vernon Argus, were 3rd and 6th respectively (authority Media Records, Inc.).

Westchester buys at home, and in this concentrated area, spends over \$66,000,000 yearly on food alone. A greater portion of this market is reached

through the Westchester papers, almost entirely home delivered.

A trained research staff is constantly compiling data for various products. Surveys recently completed, and yours for the asking, cover such items as Mayonnaise, Ginger Ale, Coffee and Tea.

Your campaign, too, will receive the fullest co-operation. A discussion of your particular problem will certainly prove helpful. Write the Westchester County Publishers, Inc., Yonkers, N. Y., or the nearest office of the Kelly-Smith Company.

The Family Newspapers in the Nation's Richest County

WESTCHESTER COUNTY PUBLISHERS, INC.

- | | | | | |
|---------------------------|---|-------------------------------------|---|------------------------------------|
| Ossining Citizen Register | • | Mamaroneck Daily Times | • | Yonkers Herald Statesman |
| Tarrytown Daily News | • | Mount Vernon Daily Argus | • | New Rochelle Standard Star |
| Port Chester Daily Item | | | | White Plains Reporter (affiliated) |
| | | Peekskill Evening Star (affiliated) | | |

Nationally represented by KELLY-SMITH COMPANY, Graybar Building, New York City

CHICAGO DETROIT BOSTON PHILADELPHIA ATLANTA

Rochester, N. Y.

	City	Retail Area
Population	328,132	694,026
% U. S. A. ....	.267	.565
Retail Outlets	5,144	10,306
% U. S. A. ....	.332	.665
Income Tax Returns.....	16,059	23,232
% U. S. A. ....	.473	.684
Bank Debits (Jan.-Feb.).....increased	10.9%	
Department Store Sales (Jan.).....increased	13.0%	
Factory Employment (Jan.).....increased	12.0%	
Factory Payrolls (Jan.).....increased	10.0%	

Counties in area and % increase in new passenger car sales, '33 over '32—NEW YORK: Livingston, 23.1; Monroe, 35.2; Ontario, 28.8; Orleans, 39.7; Steuben, 43.4; Wayne, 25.4; Yates, 21.8.

Current Business Conditions

The upturn in factory production in Rochester is illustrated by the 22% advance in industrial electrical output sales in February this year over last year, and by car loadings which were 17% higher that month, and 18% higher for the months of January and February combined.

Building permits also increased 325% in February.

Grocery jobbers reported 12 to 15% increases in their total business for the first three months of the year, with February and March showing progressive improvement over January figures.

One of the largest ice cream companies reports an increase of 7% in wholesale ice cream sales for the first three months, with the March increase at 12%.

Candy jobbers reported 15% gains in business for the first quarter, with February and March showing progressive improvement over recent months.

March sales of drug jobbers were the largest in several months, with a 15% increase over last year, which was an improvement over the 10% increase for the quarter.

Radio sales are about 20% ahead for the quarter—January being about even with 1933, but February and March showing big increases.

According to the Rochester Electrical League and the Rochester Gas & Electric Corporation, refrigerator sales in the quarter gained 12% over last year.

Passenger car sales in February gained 56% over January and 7% over February of last year.

The average daily number of checks cashed jumped 13% this February over last.

Syracuse, N. Y.

	City	Retail Area
Population	209,326	563,974
% U. S. A. ....	.170	.459
Retail Outlets	3,128	8,743
% U. S. A. ....	.202	.564
Income Tax Returns.....	9,685	17,973
% U. S. A. ....	.285	.530
Bank Debits (Jan.-Feb.).....increased	5.8%	
Department Store Sales (March).....increased	40.0%	
Factory Payrolls (Jan.).....increased	68.8%	

Counties in area and % increase in new passenger car sales, '33 over '32—NEW YORK: Cayuga, 13.6; Cortland, 16.7; Madison, 14.6; Onondaga, 41.2; Oswego, 21.9; Seneca, 40.8; Tompkins, 5.4.

Current Business Conditions

On the first of the month a \$30,000,000 grade-crossing elimination operation of the New York Central began employing 3,500 workers, and the project will extend over a year's period.

A new silk factory opened in Syracuse within the month and is employing 300 people regularly.

The Brown-Lipe-Gear plant of the General Motors, which has been closed for two years, will be reopened soon, and General Motors AC Spark Plug will be in production with 3,500 skilled workers employed.

Federal tax returns for the Syracuse district total \$6,000,000, over two and one-half times greater than the first quarter of 1933.

The improvement is confirmed in all quarters—such as withdrawals from banks for payroll purposes which indicate a definite resumption of productive activity and increased pay rates.

The Franklin Automobile Company went into bankruptcy last month, but city business men are trying to refinance the industry.

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Charlotte, N. C.

	City	Retail Area
Population	82,675	870,374
% U. S. A.067	.709
Retail Outlets	954	7,184
% U. S. A. ....	.062	.464
Income Tax Returns.....	3,285	7,025
% U. S. A. ....	.097	.207
Bank Debits (Jan.-Feb.).....increased	26.7%	
Department Store Sales.....increased	32.5%	
Payrolls (Mar.).....increased	20.0%	

Counties in area and % increase in new passenger car sales, '33 over '32—NORTH CAROLINA: Alexander, 84.2; Anson, 75.0; Cabarrus, 96.9; Caldwell, 124.0; Catawba, 107.1; Cleveland, 93.3; Gaston, 154.9; Iredell, 67.0; Lincoln, 111.4; Mecklenburg, 55.5; Montgomery, 10.1; Richmond, 110.9; Rowan, 110.7; Rutherford, 146.1; Scotland, 142.4; Stanly, 122.5; Union, 65.3. SOUTH CAROLINA: Cherokee, 174.7; Chester, 130.4; Lancaster, 150.7; York, 103.2.

Current Business Conditions

Cotton farmers in the Charlotte district are about 100% better off than this time last year, and total agricultural income in the area is estimated by the county agent as being 40% better.

People are optimistic, and manufacturing, wholesaling and retailing operations are being accelerated.

The Hyland Park Manufacturing Company is now employing 4,300 men—an increase of 15% in employment and 12% in payrolls since last year.

Department stores are showing current increases of from 30% to 35%.

A group of typical drug stores reports average increases of 18.6%, while retail grocers are about 9% better than last year.

Pettit Motor Company sales increased 170% last month; Heath Motor Company, 100%; Burwell Nash, 25%; Scott Buick, 20%; Upchurch Packard, 25%; Lincoln, 20%.

According to the city building inspector, contracts awarded in the first half of last month were 28% greater in dollar value than last year.

Uniform improvement is reported from the fifteen smaller cities within a radius of 50 to 60 miles, including Concord, a large textile center; Gastonia, the largest textile center in the world, 30 miles away; and Monroe, an important cotton market.

Raleigh, N. C.

	City	Retail Area
Population	37,379	1,055,741
% U. S. A. ....	.030	.860
Retail Outlets	573	9,571
% U. S. A. ....	.037	.618
Income Tax Returns.....	1,480	6,008
% U. S. A. ....	.044	.177

Counties in area and % increase in new passenger car sales, '33 over '32—NORTH CAROLINA: Beaufort, 105.7; Carteret, 21.6; Craven, 86.3; Cumberland, 88.9; Duplin, 58.0; Edgecombe, 164.8; Franklin, 156.1; Granville, 158.3; Greene, 202.8; Halifax, 135.1; Harnett, 108.1; Hoke, 128.6; Hyde, -36.4; Johnston, 149.0; Jones, 295.4; Lee, 105.6; Lenoir, 149.8; Martin, 150.0; Moore, 35.2; Nash, 141.9; Onslow, 108.6; Pamlico, 57.9; Pitt, 203.6; Robeson, 173.3; Sampson, 156.1; Vance, 99.1; Wake, 60.1; Warren, 126.1; Wayne, 135.3; Wilson, 217.4.

Winston-Salem, N. C.

	City	Retail Area
Population	75,274	290,143
% U. S. A. ....	.061	.236
Retail Outlets	894	2,753
% U. S. A. ....	.058	.178
Income Tax Returns.....	1,839	2,625
% U. S. A. ....	.054	.077
Bank Debits (Jan.-Feb.).....increased	31.4%	
Department Store Sales (March).....increased	42.0%	
Payrolls (March).....increased	10.0%	

Counties in area and % increase in new passenger car sales, '33 over '32: NORTH CAROLINA: Davidson, 114.7; Davie, 10.2; Forsyth, 96.3; Stokes, -3.0; Surry, 101.5; Wilkes, 66.7; Yadkin, 76.7.

SALES MANAGEMENT

Current Business Conditions

The R. J. Reynolds plant is currently employing 14,000 men—an increase of 20% in employees, and from 10% to 15% in payrolls. The P. H. Hanes plant is employing 1,600 workers—an increase of 20% over last year. The Chatham Blanket Company, 700 workers, represents an increase of 5%.

Sales of typical grocery stores were up more than 20% in March; a group of drug stores, including both independent and chain, were up 16%; two leading department stores had average increases of slightly over 42%.

Chrysler-Plymouth business was up 200% in March; Chevrolet, 100%; Hudson-Essex, 30%; Buick, 40%; Packard, 33%; Cadillac, 50%.

Agricultural income in the area was 25% better than last year, according to Chamber of Commerce estimates.

Building construction has as yet shown no increase.

The hosiery, blanket and knitting mills are said to be so well supplied with orders that they will run at full capacity until at least January 1, 1935.

The furniture business has yet to show an increase.

Akron, Ohio

	City	Retail Area
Population	255,040	450,563
% U. S. A. ....	.208	.367
Retail Outlets	3,057	5,298
% U. S. A. ....	.197	.342
Income Tax Returns.....	8,988	11,777
% U. S. A. ....	.265	.347
Bank Debits (Jan.-Feb.).....	decreased 3.0%	
Department Store Sales (Feb.).....	increased 63.7%	
Factory Employment (Feb.).....	increased 34.0%	
Factory Payrolls (Feb.).....	increased 43.6%	

Counties in area and % increase in new passenger car sales, '33 over '32—OHIO: Summit, 97.0; Wayne, 31.6; Portage, 46.4; Holmes, 17.6.

Current Business Conditions

According to Chamber of Commerce estimates, total payrolls in the city are currently 43% ahead of last year.

The most recent official report of department store sales was for February, when business increased 63.7%, but the Ross investigator learned that March business exceeded the February total.

A group of typical grocery stores surveyed by Ross all showed increases, with the range from 10 to 30%, while typical drug stores had increases of from 15 to 62%.

Attendance gains at motion picture theatres ranged from 10% at the National to 80% at the Orpheum.

The McCormack-Ford Agency finds business 46.6% ahead of last year; a leading Chevrolet agent, 48.7% better; the Portage-Buick Company, 33½% better; the Oldsmobile division of Cadillac, 70.6% better.

The general manager of the Farmer Growers' Association estimates that the agricultural income in the area is 49.3% ahead of last year.

March, 1934, shipping reports of the Pennsylvania railroad show a 90% increase.

The rubber industries expect this year to sell 37,000,000 tires for replacement, and to equip tires for 3,000,000 new cars. In anticipation of this they are filling their warehouses at all branches, and very few rubber workers are idle at present.

The discontinuing of CWA projects took \$150,000 per week out of circulation, but already new projects have been started and business leaders think that in the course of a few weeks there will be little or no unemployment in the city.

Circulation and advertising lineage of Akron newspapers are showing favorable increases over last year.

Cincinnati, Ohio

	City	Retail Area
Population	451,160	1,319,874
% U. S. A. ....	.367	1.075
Retail Outlets	6,950	17,594
% U. S. A. ....	.449	1.136
Income Tax Returns.....	26,512	40,467
% U. S. A. ....	.781	1.192
Bank Debits (Jan.-Feb.).....	increased 1.2%	
Department Store Sales (Feb.).....	increased 12.3%	
Factory Employment (Jan.).....	increased 45.5%	
Factory Payrolls (March).....	increased 17.5%	

Counties in area and % increase in new passenger car sales, '33 over '32—OHIO: Adams, 50.0; Brown, 48.3; Butler, 57.1; Cler-

APRIL 20, 1934

BEACON JOURNAL

Carrier Delivery Circulation sets ALL TIME Record!

Sworn Publisher's Statement

Daily Average Net Paid Circulation of the
AKRON BEACON JOURNAL
Six Months' Period Ending March 31, 1934

CITY ZONE—

*Carrier Delivery	37,995
By Independent Carriers Filing Lists With Publisher	
Dealers and Carriers	2,516
Not Filing Lists With Publisher	
Street Vendors	7,355
Publisher's Counter Sales	30
Total City Zone	47,896

RETAIL TRADING ZONE—

Dealers and Carriers	14,696
Not Filing Lists With Publisher	
Mail Subscriptions	3,634
Total Retail Trading Zone	18,330
Total City and Retail Trading Zones	66,226

ALL OTHER—

Dealers and Carriers	687
Mail Subscriptions	1,277
Total "All Other"	1,964
TOTAL NET PAID	68,190

*This figure exceeds that of any previous 6 or 12 months period

We hereby make oath and say that all statements set forth above are true.

JOSEPH M. AYLWARD,
Circulation Manager

J. H. BARRY,
Business Manager

Subscribed and Sworn to before me this 9th day of April, 1934.
My commission expires Nov. 17, 1936.

F. J. WYNHOFF,
Notary Public

March Daily Average Net Paid Circulation
69,586

Net Paid Circulation is actual number of copies sold and paid for

AKRON BEACON JOURNAL

Member ABC—ANPA
Major Market Newspapers, Inc.

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mont, 24.5; Clinton, 74.5; Hamilton, 45.6; Highland, 50.3; Pike, 5.0; Scioto, 85.1; Warren, 66.8. INDIANA: Dearborn, 6.5; Franklin, 16.3; Ohio, -4.2; Ripley, 5.8; Switzerland, 10.3. KENTUCKY: Boone, -3.6; Bracken, 70.6; Campbell, 28.3; Fleming, 50.0; Gallatin, 138.4; Grant, 20.6; Greenup, 60.4; Harrison, 34.7; Kenton, 44.6; Lewis, 36.0; Mason, 50.0; Owen, 27.5; Pendleton, 32.0; Robertson, 30.8.

Current Business Situation

The general business picture is very encouraging, with every line of business reporting first quarter gains over last year. March sales of new passenger cars totalled 1,196, as against 712 last year. The 145 Kroger stores in the area had an increase of 18% last month. The 184 A & P stores improved their business 9.4%. The 56 Burke stores increased 15%.

The Liggett stores were up 28.4%; Dow Drug Company, 32%; McKesson, 30%; Heister, 19%. Business at the downtown first run moving picture theatres is 20% better than last year, while neighborhood and suburban theatres have increased their business 25% to 35%.

Important automotive distributors point to these increases: Chevrolet, 37%; Ford, 28%; Buick, 26%; Nash, 25%; Packard, 20%.

The 2,601 Kroger employes represent an 11% gain in employment and a 9% increase in payroll, while at the Procter & Gamble plant employment is up 22.6% and payrolls 33%. The Crosley Radio Corporation, with 2,875 employes, has 113% more workers than a year ago at this time. Building contracts during March were 14% better than last year.

Business in Hamilton, Dayton and Middletown is far above recent years. All the Ohio River towns, including Charlestown, West Virginia; Huntington, West Virginia; Ironton and Portsmouth are enjoying good business. Merchants in the Kentucky towns in the coal mining territory report better than average business in all lines. The total of all building permits in the first two months of the year jumped from \$239,190 in 1933 to \$309,655 this year.

Columbus, Ohio

	City	Retail Area
Population	290,564	920,250
% U. S. A. ....	.237	.750
Retail Outlets	3,722	11,267
% U. S. A. ....	.240	.727
Income Tax Returns.....	9,123	14,409
% U. S. A. ....	.269	.425
Bank Debits (Jan.-Feb.).....	increased 11.4%	
Department Store Sales (Feb.).....	increased 19.6%	
Factory Employment (March).....	increased 14.1%	
Factory Payrolls (March).....	increased 15.6%	

Counties in area and % increase in new passenger car sales, '33 over '32—OHIO: Athens, 78.9; Coshocton, 14.2; Delaware, -1.2; Fairfield, 34.6; Fayette, 54.6; Franklin, 27.7; Gallia, 45.5; Hocking, 35.4; Jackson, 12.8; Knox, 35.0; Licking, 35.1; Madison, 63.3; Marion, 46.3; Meigs, 34.4; Morrow, 20.9; Perry, 39.8; Pickaway, 48.6; Ross, 26.2; Union, 18.0; Vinton, 50.9.

Current Business Conditions

According to figures compiled by the Chamber of Commerce and by the Bureau of Business Research of Ohio State University, every industry in Columbus is showing material gains over last year.

According to O. S. U. figures, current commercial employment of 54,582 in the area represents a gain of 14.1%.

Agricultural income in the trade area is approximately 12% better than last year.

Current car loadings are 45.5% higher; postal receipts are up 20%; downtown first-run moving picture theatres report attendance gains of 10% to 15%, with neighborhood theatres up 15 to 20%.

Ross investigators found that 80% of the retail grocery firms were doing a better business, with gains averaging about 12%, while a group of typical druggists had a composite increase of 10.2%.

March sales at the McCann Department Store were 39.7% over last year, while at Hugh's the gain was 14%.

One dealer in low-priced cars reports a March increase of 466%; another 20%; the Columbus-Buick Company, 175% better, but both Lincoln and Packard report decreases from last year.

Building in March showed a 63.5% gain over the depressed figures of last year.

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Dayton, Ohio

	City	Retail Area
Population	200,982	443,429
% U. S. A.164	.361
Retail Outlets	2,010	4,955
% U. S. A. ....	.130	.320
Income Tax Returns.....	8,228	10,700
% U. S. A. ....	.242	.315

Counties in area and % increase in new passenger car sales, '33 over '32—OHIO: Darke, 36.9; Greene, 54.8; Miami, 87.5; Montgomery, 78.1; Preble, -5.4; Shelby, 48.1.

Toledo, Ohio

	City	Retail Area
Population	290,718	858,680
% U. S. A. ....	.237	.699
Retail Outlets	3,724	10,818
% U. S. A. ....	.240	.698
Income Tax Returns.....	12,297	19,213
% U. S. A. ....	.362	.566
Bank Debits (Jan.-Feb.).....	increased 9.5%	
Department Store Sales (Feb.).....	increased 13.0%	
Payrolls (March)	increased 50.0%	

Counties in area and % increase in new passenger car sales, '33 over '32—OHIO: Defiance, 69.2; Fulton, 26.1; Hancock, 34.8; Henry, 28.4; Lucas, 75.3; Ottawa, 52.1; Paulding, 34.5; Putnam, 41.9; Sandusky, 20.3; Seneca, 47.1; Van Wert, 50.6; Williams, 46.0; Wood, 73.8; Wyandot, 59.7. MICHIGAN: Hillsdale, 5.5; Lenawee, 19.6; Monroe, 61.6.

Current Business Conditions

According to the estimates of the Merchants and Manufacturers Association, current payrolls are 50% ahead of last year. The Willys Overland plant is again in production with a force of 3,000 men and there are strong hopes for reorganization and continued operations. Three other manufacturing plants, representing different lines of manufacturing and all employing more than 500 people, show employment gains of from 33 1/3% to 300%. Fifty-one firms which last year employed 8,780 now have 16,369 on their payrolls.

Electric power consumption is running 30.6% ahead of last year; bank deposits have increased \$10,000,000 since last December; advertising in local newspapers is running 75% to 100% ahead of last year, with increases also in circulation.

A group of grocery stores showed average gains of 40% in March, with the range running from 5% to 100%. Drug stores surveyed by Ross investigators showed an average increase of 49% with a range of 25% to 100%. Department stores are showing even better increases with Meyer-Jonasson & Company reporting a 200% increase in March and the B. R. Baker Men's Wear Store a 125% increase. Motion picture attendance averages at least 20% above last year. A leading Chevrolet dealer has a 30% increase for the year; a Plymouth distributor, 50%; Chrysler, 25%; Buick, 25%; Cadillac, La Salle, 250%.

Youngstown, Ohio

	City	Retail Area
Population	169,912	359,206
% U. S. A. ....	.138	.293
Retail Outlets	2,040	4,153
% U. S. A. ....	.132	.268
Income Tax Returns.....	11,504	13,810
% U. S. A. ....	.339	.407
Bank Debits (Jan.-Feb.).....	increased 27.7%	
Department Store Sales (March).....	increased 90.0%	
Payrolls (March)	increased 22.0%	

Counties in area and % increase in new passenger car sales, '33 over '32—OHIO: Mahoning, 123.1; Trumbull, 141.3.

Current Business Situation

Steel mills in the Youngstown district are working at approximately 54% of capacity and the employment situation is improving every month. At the Republic Iron & Steel plant 7,000 workers are on the payrolls at present—representing a 150% increase in numbers over last year and a 200% increase in payrolls. This upturn in employment has brought extraordinary gains to most retail stores. A group of typical grocery stores surveyed by Ross showed no decreases and gains ranging from 3% to 77%.

SALES MANAGEMENT

AGAIN....

Circulation Trends
are added proof you need
ONLY the Times-Star to
sell Cincinnati

Times-Star circulation gains regularly each month. The new six months A. B. C. statement will show 5,202 more readers than for the same period last year. During March, 1934, city and suburban circulation hit an all time high and, of course, the milline rate is the lowest in history. Today the Times-Star offers unprecedented space value in Cincinnati.

CINCINNATI TIMES-STAR

Largest daily Circulation in Cincinnati

REPRESENTATIVES:—Martin L. Marsh 60 East 42nd Street, New York
Kellogg M. Patterson, 333 North Michigan Avenue, Chicago

APRIL 20, 1934

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over last year. Drug store gains ranged from 10% to 48%.

March business at the Strauss-Hirshburg Department Store was 100% better than last year and at McKelvey's the increase was 94%. Motion picture attendance at such theatres as the Strand, State, Warner's and Palace was from 25% to 50% better than last year. Sales increases among dealers of low priced cars are running from 50% to 65% ahead of last year, medium priced cars are up to 30% ahead and only the high priced cars have failed to show an increase.

According to records at the City Hall, building contracts awarded in the first half of March amounted to 62% more in dollar value than the same period last year.

Cleveland, Ohio

	City	Retail Area
Population	900,429	2,531,659
% U. S. A. ....	.733	2.062
Retail Outlets	12,470	31,678
% U. S. A. ....	.805	2.045
Income Tax Returns.....	20,064	76,202
% U. S. A. ....	.591	2.245
Bank Debits (Jan.-Feb.).....	decreased -9.7%	
Department Store Sales (Feb.).....	increased 36.2%	
Factory Employment (Feb.).....	increased 23.7%	
Factory Payrolls (Feb.).....	increased 22.2%	

Right to the Last Decimal!

The executives of a large New York advertising agency—in common with hundreds of their brethren—have been fascinated every fortnight by the disclosures in the SM-Ross Federal surveys.

They tell us, "When your April 1 survey on cosmetics came out we thought we had caught you in a bad error. Your findings showed that 88 per cent of women did not use depilatories.

"Such a small number seemed obviously cockeyed. We have 200 women office employees and so we decided to ask them whether they used a depilatory.

"Our independent survey confirmed your report. Not only were you *close*, but you hit an absolute bull's-eye. Our survey came out with yours to the very last decimal point."

SALES MANAGEMENT conducts these every-issue surveys (through the facilities of the 33 branch offices and 3,000 field representatives of the Ross Federal Service, Inc.) to unearth dealer and consumer trends as an aid to marketing management. They constitute an experimental laboratory for our readers. Subscribers are cordially invited to submit suggestions for surveys in which they would be particularly interested.

Counties in area and % increase in new passenger car sales, '33 over '32—OHIO: Ashland, 37.7; Ashtabula, 39.3; Carroll, 38.5; Columbia, 82.6; Crawford, 52.3; Cuyahoga, 51.8; Erie, 40.2; Geauga, 31.0; Harrison, 128.9; Holmes, 17.6; Huron, 22.0; Lake, 59.7; Lorain, 35.7; Medina, 43.8; Portage, 46.4; Richland, 33.3; Stark, 129.7; Summit, 97.0; Tuscarawas, 102.4; Wayne, 31.6.

Current Business Situation

The Chamber of Commerce believes that *total* payrolls in the city are 75% higher than last year—a figure considerably higher than the *factory* payroll figures as compiled for the United States Bureau of Labor Statistics.

Retail sales in general are estimated at 40% higher than March last year, with automobile sales soaring to a 300% increase.

One hundred identical Cleveland firms were employing 42,478 employees at the end of March, 1933, while this year the same firms had 64,519 on their payrolls and in addition there were 3,000 employees on strike.

A group of grocery stores surveyed by Ross investigators showed gains of 5% to 30% in March for independents and as high as 200% for some of the chain stores (the former extended credit during the bank holidays last year).

Typical drug stores showed increases of from 10% to 30%, while department stores in recent months have been running from 35% to 45% ahead of last year. Motion picture theatres in the Cleveland area reported attendance increases of from 10% to 100%.

The Central Chevrolet Company points in recent weeks to a 150% increase over last year; the Baker King Plymouth Agency, 50%; the Englander-Pontiac-Buick Company, 200%; E. J. Arntstine Studebaker Company, 50%; Cadillac, 40% and Packard, 30%.

Approximately 4,000 workers are employed by the General Electric plants and payrolls are 10% above last year. Three thousand two hundred are employed by Richman Brothers—a 5% increase in numbers and 10% in payrolls; 4,500 by the Fisher Body Company—a 10% increase in numbers and 15% in payrolls. Building has yet to show an appreciable pick-up, but currently is 10% better than last year.

Classified and general advertising in the three Cleveland newspapers is currently showing an increase of 63%.

The course of recovery during March and early April was punctuated by strikes in more than a dozen important plants—a sure sign of a return toward prosperity, as labor troubles always accompany the rebounds from a depression.

The State-City Employment Bureau reports that there is an actual shortage at the present time in skilled labor and that in March actual placements of skilled workers increased 1,429% over last March.

March automotive sales in the City of Cleveland were 2,533 new cars; 8,933 used cars, and 289 trucks, compared with 863 new cars, 4,423 used cars, and 68 trucks for March, 1933. The White Company reports that truck orders during the first quarter showed an increase of 150% over 1933 and that March was the biggest month of the company since 1930.

Cleveland business men believe that one of the most reliable barometers on conditions is the sale of street car passes. The increase in the first quarter of 1934 over the same period of 1933 was 46.7%.

Sales of electrical current for industrial use improved 22% in the first quarter.

Oklahoma City, Okla.

	City	Retail Area
Population	185,389	1,455,076
% U. S. A. ....	.151	1.113
Retail Outlets	2,432	16,860
% U. S. A. ....	.157	1.088
Income Tax Returns.....	7,034	15,603
% U. S. A. ....	.207	.460
Bank Debits (Jan.-Feb.).....	increased 21.5%	
Department Store Sales (Feb.).....	increased 27.6%	
Payrolls (March)	increased 30.0%	

Counties in area and % increase in new passenger car sales, '33 over '32—OKLAHOMA: Atoka, 14.1; Beckham, 174.8; Blaine, 222.6; Bryan, 57.1; Caddo, 163.8; Canadian, 89.5; Carter, 83.2; Choctaw, 100.0; Cleveland, 45.5; Coal, 81.1; Comanche, 149.1; Cotton, 81.6; Custer, 148.7; Dewey, 152.6 Garfield, 148.4;

Because of the

CLEVELAND PRESS—P.T.A. KITCHEN INVENTORY



*The Cleveland - Press -
P.T.A. Kitchen Inventory
Is Amply Protected
by Copyright Against
Infringement of Method.*

Cleveland is now
America's Greatest
TEST MARKET for
Food Products . . .

Any test can be effective and informative only to the extent that its elements are controlled.

The Cleveland Press, through its P.T.A. Kitchen Inventories, has virtually converted Cleveland into a testing laboratory for food products sales. From an adequate, perfectly apportioned sample of housewives, it has gathered information to guide the experimenter.

Cleveland is the first major market in America to be so completely analyzed that guess work and the trial-and-error method need no longer be used. Positive, comprehensive knowledge has supplanted preconceived impressions—and, in many instances, proved them false.

To the manufacturer whose sales programs have gone sour—to the newcomer with metropolitan ambitions—to every factor in the merchandising of foodstuffs, Cleveland now offers an opportunity to test new products and new ideas against a background of *known* facts and *proved* methods.

Consult The Press or the nearest office of the National Advertising Department for detailed information.



The Cleveland Press

A Scripps • Howard Newspaper

NATIONAL ADVERTISING
DEPARTMENT OF
SCRIPPS-HOWARD
NEWSPAPERS
230 PARK AVENUE, N. Y. C.



MEMBER OF THE UNITED
PRESS . . . OF THE AUDIT
BUREAU OF CIRCULATIONS
and of
MEDIA RECORDS, INC.

CHICAGO . SAN FRANCISCO . LOS ANGELES . DALLAS . DETROIT . PHILADELPHIA . ATLANTA

APRIL 20, 1934

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Garvin, 80.5; Grady, 64.9; Greer, 311.1; Harmon, 415.0; Hughes, 28.7; Jackson, 202.5; Jefferson, 135.4; Johnston, 58.5; Kingfisher, 181.7; Kiowa, 314.1; Latimer, 60.9; Lincoln, 43.9; Logan, 101.1; Love, 152.4; McClain, 110.6; McCurtain, 134.2; Major, 150.0; Marshall, 152.9; Murray, 101.6; Noble, 142.0; Oklahoma, 33.9; Payne, 56.0; Pittsburgh, 53.6; Pontotoc, 66.3; Pottawatomie, 66.7; Pushmataha, -10.4; Roger Mills, 182.1; Seminole, 81.5; Stephens, 67.4; Tillman, 292.3; Washita, 316.2.

Current Business Conditions

The Chamber of Commerce estimates that total payrolls in the trading area are up at least 30% over last year and this is borne out by the increases in all classes of retail trade. Chain groceries (Kroger, A. & P., etc.) report gains of 22% in March over last year and some of the independents were up 30%. Veazey's, a chain of 12 drug stores, reports business 12% better, while the Crown chain of 14 stores points to an increase of 20%. Department store business was up 25% for the month of March— even more than that in the two weeks preceding Easter.

Two leading distributors of low-priced cars report gains of 175% and 276%, respectively, for the month of March; the Buick Motor Company's business was up 45%, Hudson 30%, Cadillac 10%, Packard, 10%. Both employment and payrolls at the Armour and Wilson packing plants have increased 20% to 26%.

Building in the first half of March increased 275% in dollar value over last year. Among the buildings now being constructed are a new railroad station, a brewery, a 22-story hotel and several school buildings.

Telegraph income is a good index of business conditions and Postal reports a 40% increase in outgoing telegrams and clock rentals for the first half of March over the same period last year. The Oklahoma Publishing Company (*Daily Oklahoma Times*, *Farmer-Stockman*, and Radio Station WKY) has a payroll 15% greater than last year and reports business in all lines up from 35% to 50%.

Tulsa, Okla.

	City	Retail Area
Population	141,258	653,722
% U. S. A. ....	.115	.532
Retail Outlets	1,586	7,117
% U. S. A. ....	.102	.459
Income Tax Returns.....	7,377	12,532
% U. S. A. ....	.217	.369

Counties in area and % increase in new passenger car sales, '33 over '32—OKLAHOMA: Adair, 111.1; Cherokee, 24.7; Creek, 64.6; Haskell, 20.6; Kay, 106.8; McIntosh, 81.6; Mayes, -2.6; Muskogee, 29.7; Okfuskee, 63.1; Okmulgee, 92.0; Osage, 27.8; Pawnee, 11.4; Rogers, 8.7; Tulsa, 60.2; Wagoner, 61.9;

Portland, Ore.

	City	Retail Area
Population	301,815	1,046,287
% U. S. A. ....	.246	.852
Retail Outlets	5,150	15,864
% U. S. A. ....	.332	1.024
Income Tax Returns.....	11,309	19,326
% U. S. A. ....	.335	.569
Bank Debits (Jan.-Feb.).....increased	31.5%	
Department Store Sales (Feb.).....increased	17.4%	

Counties in area and % increase in new passenger car sales, '33 over '32—OREGON: Baker, 133.8; Benton, 31.0; Clackamas, 73.0; Clatsop, 68.1; Columbia, 29.2; Coos, 85.7; Crook, 23.5; Curry, 133.3; Deschutes, 67.1; Douglas, 37.3; Gilliam, 287.5; Grant, 335.8; Harney, 234.8; Hood River, 16.7; Jackson, 60.5; Jefferson, -31.2; Josephine, 56.3; Klamath, 115.5; Lake, 124.1; Lane, 62.5; Lincoln, 70.1; Linn, 55.1; Marion, 35.4; Morrow, 11.5; Multnomah, 55.4; Polk, 2.7; Sherman, 400.0; Tillamook, 22.6; Umatilla, 55.0; Union, 126.1; Wallowa, 66.7; Wasco, 117.1; Washington, -11.8; Wheeler, -33.3; Yamhill, 21.7. WASHINGTON: Clarke, -11.5; Cowlitz, 134.6; Klickitat, -30.2; Pacific, 130.6; Skamania, 23.5; Wahkiakum, 145.5.

Current Business Conditions

According to Babson's report, Portland business in 1933 gained 16% over 1932—a gain 6% greater than that for the country at large. Chief among the factors which are making business better in Portland are a substantial increase in farm income, the marked improvement in the condition of the lumber industry (credited largely to the NRA codes), the increase of employment in the various recovery acts, and the approval of the allocation for

the \$31,000,000 Bonneville Dam. This is expected to give an abundance of cheap power virtually at tide water which, combined with a wide range of available basic raw materials, should increase the manufacturing and commercial development of the city.

More than \$50,000,000 of PWA money has gone into fourteen projects in the Portland trading area.

A group of selected manufacturers of woolen textiles, clothing and food products show gains of from 12 to 60% in number of workers employed, and from 15 to 96% in payrolls.

Altoona, Pa.

	City	Retail Area
Population	82,054	177,149
% U. S. A. ....	.067	.144
Retail Outlets	171	2,378
% U. S. A. ....	.076	.154
Income Tax Returns.....	1,942	2,946
% U. S. A. ....	.057	.087

Counties in area and % increase in new passenger car sales, '33 over '32—PENNSYLVANIA: Bedford, 14.8; Blair, 40.7.

Erie, Pa.

	City	Retail Area
Population	115,967	284,890
% U. S. A. ....	.094	.232
Retail Outlets	1,881	4,240
% U. S. A. ....	.121	.274
Income Tax Returns.....	4,275	7,366
% U. S. A. ....	.125	.217

Counties in area and % increase in new passenger car sales, '33 over '32—PENNSYLVANIA: Crawford, 26.6; Erie, 17.8; Forrest, -7.5; Warren, 41.0.

Harrisburg, Pa.

	City	Retail Area
Population	80,339	778,774
% U. S. A. ....	.065	.634
Retail Outlets	1,859	11,935
% U. S. A. ....	.120	.770
Income Tax Returns.....	3,446	13,512
% U. S. A. ....	.102	.398

Counties in area and % increase in new passenger car sales, '33 over '32—PENNSYLVANIA: Adams, 8.4; Centre, 41.8; Cumberland, .1; Dauphin, 14.4; Huntingdon, 68.4; Juniata, 108.6; Mifflin, 57.4; Montour, 32.6; Northumberland, 24.6; Perry, 34.2; Snyder, 19.6; Union, 5.3; York, 7.3.

Scranton, Pa.

	City	Retail Area
Population	143,433	361,817
% U. S. A. ....	.117	.295
Retail Outlets	2,336	5,556
% U. S. A. ....	.151	.359
Income Tax Returns.....	5,731	9,204
% U. S. A. ....	.168	.271

Counties in area and % increase in new passenger car sales, '33 over '32—PENNSYLVANIA: Lackawanna, 16.6; Pike, 11.6; Wayne, 17.9; Wyoming, 3.0.

Philadelphia, Pa.

	City	Retail Area
Population	1,950,961	4,564,148
% U. S. A.	1.589	3.717
Retail Outlets	33,905	71,132
% U. S. A.	2.189	4.592
Income Tax Returns.....	71,899	146,579
% U. S. A.	2.118	4.319
Bank Debit (Jan.-Feb.).....increased	3.7%	
Department Store Sales (Jan.).....increased	7.0%	
Factory Employment (Jan.).....increased	24.7%	
Factory Payrolls (Jan.).....increased	37.4%	

MONEY TO SPEND



February sales tax figures reveal that 243,294 families are spending with surprising freedom an average of more than \$69,500 an hour over the counters of retail stores in the Oklahoma City market. Not surprising in the face of the fact that today the trend of business in every major activity in the Oklahoma City Zone is sharply UP.

Some Reasons Why Business Is GOOD in the Oklahoma City Market

	UP		UP
Pay Rolls and Employment	25%	Retail Credit Collections	30%
Farm Incomes	64%	Bank Debits	34%
Oil Income	100%	Oklahoman and Times Linage	15%
Department Store Sales	26%	Oklahoman and Times Circulation	14.5%
Building Permits	100%		

And you can keep your selling costs DOWN in this market! Because you can move your goods through thousands of stores at one

time, and deliver your sales messages to 3 out of every 5 urban families here at the lowest milline rate in the state. For quick sales at low cost, come to the Oklahoma City Market and the Oklahoman and Times.

THE DAILY OKLAHOMAN



OKLAHOMA CITY TIMES

APRIL 20, 1934

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Counties in area and % increase in new passenger car sales, '33 over '32—PENNSYLVANIA: Berks, 6.0; Bucks, 10.1; Carbon, 34.3; Chester, 19.8; Delaware, 21.4; Lancaster, 10.0; Lebanon, 32.0; Lehigh, 17.7; Monroe, 36.4; Montgomery, 29.3; Northampton, 27.6; Philadelphia, 20.2; Schuylkill, 13.8. NEW JERSEY: Atlantic, 4.5; Burlington, 4.5; Camden, 28.9; Cape May, -2.1; Cumberland, 12.9; Gloucester, 12.4; Salem, 70.8.

Current Business Situation

Philadelphia Business Progress Association estimates that total payrolls (factory and others) were 34% greater this January than last, and employment was 26% greater.

The electric light company reports 3.5% more customers this February than last, and an increase of 11.4% in consumption of electric current. Gas consumption increased 12.1% that month.

Freight port traffic increased 5% and there were 4 1/2% more riders on the transportation systems. Motion picture distributors report an increase of from 15% to 25% in attendance.

Out of a group of 10 representative grocers, 8 reported increases of 10% to 25%, while 2 said there had been no change. Out of a similar number of independent druggists, 8 reported gains of from 10% to 30%, and 2 no change.

The Bell Telephone Company had an increase of \$200,000 in net operating income in February, 1934, over 1933, and last month the Pennsylvania Railroad Company, because of the upturn in their business, redesignated the rating of 117 men from firemen to engineers.

Philadelphia Wholesale Drug Company, a cooperative of 1,400 retail druggists, reports first quarter gains of 12 1/2% and a March upturn of 21% over last March.

A prominent tire distributor had a March gain of 104% and the Nash-Philadelphia Company is looking forward to the best automobile year since 1929. Their February business was 244% better than last year, and March, 252%.

Louis Beuhn, distributors of Atwater Kent radios, May oil burners, and Gibson refrigerators, had a 59% sales gain in January, 60.5% in February, 131% in March, while another prominent radio and refrigerator distributor had corresponding gains of 40%, 50% and 125%. Judson C. Burns reports a 40% increase in unit volume for the first quarter on General Electric refrigerators, and a dollar volume considerably greater as a large number of higher priced refrigerators were sold.

Sell the Eastern Market Through Our Sales and Merchandising Service

Operating in the most productive territory in the country—New England, New York State, New Jersey, Pennsylvania, Maryland and Delaware—Aspinwall & Harding, Inc., offer to manufacturers a complete sales organization specializing in management and execution of sales, plus an efficient merchandising service in this territory. The merchandising and selling effort perfectly synchronized because of single direction.

Our organization specializes in sales of department and chain store lines, such as grocery and drug products, hardware, toys and novelties. Where jobber relations are desirable, we operate our men on missionary sales for stimulation of jobber effort.

We are now in a position to take on a limited number of additional non-competing clients.

If you have a worthy product and wish to secure distribution and sales or expand your present activities in the eastern market write us about your problems.

Aspinwall & Harding, Inc.

Manufacturers Sales and Merchandising Service
80 FEDERAL STREET, BOSTON, MASS.

S. S. Fretz, Jr., Inc., distributor of General Electric oil furnaces, had a 300% first quarter increase in unit sales, while the Elliott-Lewis Company had a 700% first quarter increase in Delco oil burners.

The cooperative wholesale organization of the Frankford Grocery Company reports a 36 1/2% first quarter dollar increase, while another cooperative wholesaler, the Penn Mutual Grocery Company, has a 39% increase.

Building contracts awarded in February were 77% greater than last year; freight car loadings were up 25%; manufacturing of capital goods, 48%; and of consumption goods, 8%.

Across the river, in Camden, shipbuilding plants and government airplane factories are very busy.

Wilkes Barre, Pa.

	City	Retail Area
Population	86,626	493,912
% U. S. A. ....	.071	.402
Retail Outlets	1,916	7,647
% U. S. A. ....	.124	.494
Income Tax Returns.....	2,907	9,346
% U. S. A. ....	.086	.275

Counties in area and % increase in new passenger car sales, '33 over '32—PENNSYLVANIA: Columbia, 7.3; Luzerne, 17.5.

Pittsburgh, Pa.

	City	Retail Area
Population	669,817	3,233,190
% U. S. A. ....	.546	2.633
Retail Outlets	8,547	36,583
% U. S. A. ....	.552	2.361
Income Tax Returns.....	40,698	94,696
% U. S. A.	1.199	2.790
Bank Debit (Jan.-Feb.).....	increased	12.2%
Department Store Sales (Feb.).....	increased	18.9%
Factory Employment (Jan.).....	increased	24.7%
Factory Payrolls (Jan.).....	increased	38.8%

Counties in area and % increase in new passenger car sales, '33 over '32—PENNSYLVANIA: Allegheny, 65.5; Armstrong, 28.5; Beaver, 88.1; Butler, 66.9; Cameron, 36.6; Clarion, 37.4; Clearfield, 29.0; Elk, 23.3; Fayette, 83.8; Greene, 53.9; Indiana, 3.3; Jefferson, 7.0; Lawrence, 82.1; Mercer, 53.4; Venango, 38.1; Washington, 70.9; Westmoreland, 63.2. WEST VIRGINIA: Hancock, 147.8; Marion, 50.4; Monongalia, 40.8; Preston, 41.5. OHIO: Jefferson, 158.0.

Current Business Situation

March tonnage of the iron and steel companies shows an increase of approximately 33 1/3% over last year and carries with it a 25% increase in employment and a 30% increase in wages. The coal industry shows an average production increase of 30% and as coal and steel are Pittsburgh's major industries, they are reliable business barometers for the trading area. A group of representative grocery stores increased their business 15% in March. Drug stores were up 15.6%. The Kaufmann department store boosted their March business 42% and Frank & Seder boosted theirs 61%. Increases among automotive dealers were uniform and the following are typical: Plymouth 75%, Chevrolet 40%, Buick 12%, Chrysler 15%, Lincoln 25%, Packard 30%. Motion picture attendance was up approximately 20% despite increased prices.

Business in the tributary cities showed similar increases, with an average of approximately 25% increase in purchasing power and retail sales in McKeesport, Clairton, Homestead, Braddock, Duquesne and Munhall.

In the radio field, one leading jobber reported that March, 1934, sales volume was 245% better than their figures for last year. This same jobber reports that during the first three months of this year unit sales are double those of the first quarter, 1933, and dollar sales have tripled. Another jobber reports that their February and March sales this year were the best that they have experienced in these months of the last three years.

In the electrical refrigerator field, one jobber reports his March sales as being up 300% over March, 1933, and the jobber also estimated that total refrigerator business in Pittsburgh during March was approximately double that of March, 1933. Another jobber reported their March sales as being 700% better than March, 1933, sales.

One tobacco jobber reports that last month's sales were from

PUBLIC LEDGER
(Morning & Sunday)
MERGES WITH
THE PHILADELPHIA INQUIRER



ON MONDAY, April 16th, The Morning Public Ledger was merged with The Morning Philadelphia Inquirer and on the following Sunday, April 22nd, The Sunday Ledger merges with The Sunday Inquirer. The Evening Public Ledger is not affected in any way by this merger.

The Greater Philadelphia Inquirer thus created emerges from the consolidation as the largest Morning and Sunday newspaper in Pennsylvania and one of the greatest in America.

Although the circulation of The Inquirer will be greatly increased by the consolidation there will be no change in The Inquirer general rates,

either individually or in combination with The Evening Ledger.

Most modestly stated, The Morning Inquirer circulation will exceed 250,000 and The Sunday Inquirer passes well over the 500,000 mark.

No effort or expense will be spared to make The Greater Inquirer Philadelphia's finest newspaper. Added to the regular Inquirer features and news will be 43 of the best and most popular features of The Public Ledger.

It is sincerely believed that The Greater Philadelphia Inquirer offers a greatly improved newspaper and a splendid advertising medium at a most attractive rate.



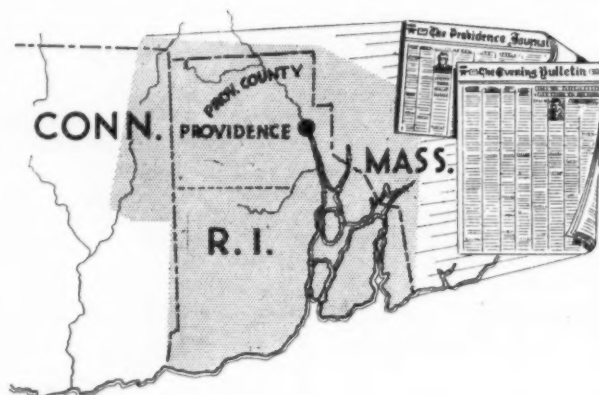
The Philadelphia Inquirer
PHILADELPHIA, PENNA.

MORNING

ESTABLISHED 1829

SUNDAY

Pennsylvania's Greatest Morning Newspaper



Compact—! A Major Market

of Nearly 1,000,000 Consumers

See the editorial market data below to learn important detailed facts about current business conditions and today's activities of this highly concentrated population. Compact and readily accessible—the Providence area is New England's second largest market.

Covered Effectively by the Journal and Bulletin

Widely read, these two papers offer a daily coverage of nearly three-quarters of the total buying power of Rhode Island readers. Group coverage ranges from about 40% among the lower working class to 90% of the wealthy families.

The Journal and Bulletin account for 82% of the total daily circulation of Providence newspapers, and reach more than 90% of all English-reading families in the A. B. C. city area. Ask for a report concerning your particular problem.

A Major Market—Worthy of Your Major Schedules

Providence Journal & Bulletin

Dominating New England's Second Largest Market

CHARLES H. EDDY CO.
Boston - New York - Chicago

Representatives

R. J. BIDWELL CO.
San Francisco - Los Angeles - Seattle

10% to 15% lower than the March, 1933, figures; while another jobber stated that his sales last month were about even with March, 1933, sales. This jobber also said that his business during the first quarter of this year was about even with that of the first quarter of 1933.

A leading candy distributor reports that sales for the first 24 days of March showed an increase of 250% over the same period of 1933; and also said that February sales were 85% greater than the same month of 1933. A smaller distributor tells us that his March sales were only 10% greater than March, 1933, sales.

Providence, R. I.

	City	Retail Area
Population	252,981	687,497
% U. S. A. ....	.206	.560
Retail Outlets	4,036	9,542
% U. S. A. ....	.260	.616
Income Tax Returns	11,966	23,729
% U. S. A. ....	.353	.699
Bank Debits (Jan.-Feb.)	increased 9.4%	
Department Store Sales (Jan.)	increased 27.0%	
Factory Employment (Feb.)	increased 22.0%	
Factory Payrolls (Feb.)	increased 32.0%	

Counties in area and % increase in new passenger car sales, '33 over '32—RHODE ISLAND: Bristol, 42.6; Kent, 41.4; Newport, -2.8; Providence, 39.2; Washington, 39.7.

Current Business Situation

March retail sales show an average improvement of approximately 20% over the same month last year, with the best gains coming from department stores, groceries and automotive dealers. A leading Ford dealer reports sales 50% better; The Providence Buick Company, 30% better; the leading Hudson dealer, 50% better. Moving picture attendance shows a moderate increase. The Providence Journal estimates that the total increase in payrolls was 34.6%. Machine tool shipments in March increased nearly 300% over last year, while unfilled orders were up approximately 500%. The Brown University Bureau of Business Research

index numbers show the following changes in important industries, the first figure being February, 1933; the second, February, 1934. Silk mill power consumed 37.9-48.6; cotton consumed 54.9-72.6; metal (non-ferrous payrolls) 44.1-73.1. Number of people employed, jewelry plants, 55.9-67.5. Employment in rubber factories, 59.6-75.

Columbia, S. C.

	City	Retail Area
Population	51,581	726,192
% U. S. A. ....	.042	.591
Retail Outlets	803	6,355
% U. S. A. ....	.052	.410
Income Tax Returns	1,768	4,328
% U. S. A. ....	.052	.128

Counties in area and % increase in new passenger car sales, '33 over '32—SOUTH CAROLINA: Bamberg, 106.5; Calhoun, 200.0; Chesterfield, 107.2; Clarendon, 252.1; Darlington, 141.9; Dillon, 197.2; Fairfield, 140.0; Florence, 172.8; Greenwood, 108.9; Horry, 251.9; Kershaw, 59.8; Lee, 228.8; Lexington, 74.5; Marion, 190.7; Marlboro, 185.9; Newberry, 201.3; Orangeburg, 103.5; Richland, 69.7; Saluda, 150.0; Sumter, 159.4.

Knoxville, Tenn.

	City	Retail Area
Population	105,802	823,342
% U. S. A. ....	.086	.671
Retail Outlets	1,382	6,775
% U. S. A. ....	.089	.437
Income Tax Returns	2,923	5,631
% U. S. A. ....	.086	.166
Bank Debits (Jan.-Feb.)	increased 20.9%	
Department Store Sales (Feb.)	increased 45.9%	

Counties in area and % increase in new passenger car sales, '33 over '32—TENNESSEE: Anderson, 144.0; Blount, 59.4; Campbell, 75.8; Claiborne, 38.6; Cocke, -9.5; Grainger, -15.0; Greene, 25.2; Hamblen, 21.4; Hancock, -50.0; Hawkins, 3.3; Jefferson, 65.4; Knox, 44.5; Loudon, 53.8; McMinn, 76.0; Monroe, 45.2;



During
1933

662 display advertisers used 1,000 lines or more

in at least one Pittsburgh newspaper. Of these,

583 or 88% used The Pittsburgh Press. **101**

of these advertisers used The Press exclusively.

*27 of the advertisers used the Post-Gazette exclusively
 18 of the advertisers used the Sun-Telegraph exclusively*

Authority: Media Records, exclusive of noncompetitive lineage in all papers, and advertising sold on group basis in both Sunday papers.

The Pittsburgh Press

A Scripps • Howard Newspaper

NATIONAL ADVERTISING
 DEPARTMENT OF
 SCRIPPS-HOWARD
 NEWSPAPERS
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 MEDIA RECORDS, INC.

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Morgan, 136.4; Polk, 125.0; Roane, 128.0; Scott, -14.3; Sevier, 35.9; Union, -36.4. KENTUCKY: Bill, 53.4; Harlan, 196.2; Whitely, 81.6. VIRGINIA: Dickinson, -2.4; Lee, 63.9; Russell, 9.0; Wise, 59.2.

Current Business Conditions

The Tennessee Valley Authority expenditures in the Knoxville district average \$1,000,000 a month for payrolls and supplies, and 3,000 men are at work on Norris Dam, a \$33,000,000 project just twenty-three miles from Knoxville. On one day in March TVA ordered \$660,000 worth of cement from firms operating in the Tennessee Valley, with the lion's share going to the Volunteer Portland Cement Company of Knoxville.

Groceries are up 20%; drugs, 50%; tobacco, 25 to 30%; refrigerators, 75 to 150%; department stores, 25 to 75%; and retailers report the best pre-Easter trade since 1930. Radio jobbers report a 150% March increase in unit sales with dollar volume even higher because more expensive sets are being sold.

Building permits this time last year were negligible, but today they are averaging over \$100,000 a month.

Practically no desirable houses are vacant, and apartments are over 95% filled.

Memphis, Tenn.

	City	Retail Area
Population	253,143	1,326,663
% U. S. A. ....	.206	1.081
Retail Outlets	3,147	19,372
% U. S. A. ....	.203	1.250
Income Tax Returns	8,795	17,924
% U. S. A. ....	.259	.528
Bank Debits (Jan.-Feb.)	increased	26.3%
Department Store Sales (March)	increased	39.3%
Employment (March)	increased	22.5%
Payrolls (March)	increased	17.5%

Counties in area and % increase in new passenger car sales, '33 over '32—TENNESSEE: Carroll, 60.3; Chester, 108.3; Crockett, 153.8; Decatur, 53.3; Dyer, 113.1; Fayette, 145.9; Gibson, 211.3; Hardeman, 41.4; Hardin, 25.0; Haywood, 83.6; Henderson, 25.7; Henry, 150.7; Lake, 117.9; Lauderdale, 82.8; Madison, 59.9; McNairy, 142.9; Obion, 132.4; Shelby, 57.2; Tipton, 222.6; Weakley, 130.6. KENTUCKY: Fulton, 122.2. ARKANSAS: Craighead, 138.1; Crittenden, 78.2; Cross, 77.1; Greene, 180.0; Lee, .0; Mississippi, 142.2; Monroe, 154.5; Phillips, 34.7; Poinsett, 115.2; St. Francis, 82.8. MISSISSIPPI: Alcorn, 101.4; Attala, 81.8; Benton, -21.4; Bolivar, 134.9; Calhoun, 186.4; Carroll, 223.5; Chickasaw, 54.8; Choctaw, 58.8; Clay, 140.0; Coahoma, 89.2; De Soto, 47.0; Grenada, 75.4; Holmes, 126.4; Humphreys, 149.0; Issaquena, 40.0; Itawamba, 38.5; Lafayette, 87.5; Lee, -20.3; Leflore, 146.9; Lowndes, 39.4; Madison, 145.3; Marshall, 38.8; Monroe, 74.3; Montgomery, 154.5; Noxubee, 55.9; Oktibbeha, 92.8; Panola, 169.6; Pontotoc, 30.0; Prentiss, 7.7; Quitman, 292.8; Sharkey, 130.2; Sunflower, 158.6; Tallahatchie, 126.7; Tate, 184.0; Tippah, 57.7; Tishomingo, 115.4; Tunica, 130.4; Union, 63.6; Washington, 141.8; Webster, 57.1; Yalobusha, 57.1; Yazoo, 156.1.

Current Business Conditions

According to the Chamber of Commerce, payrolls in Memphis are currently at least 20% higher than last year and in the surrounding area the agricultural income is up from 75% to 90%. In fact, the agricultural outlook is brighter than at any time since the war. In the past ninety days more than twenty new theatres have opened in the Memphis distributing area.

Fifty million dollars have been loaned farmers in the Memphis district on cotton held by them. These loans were made on a basis of 10 cents per lb. to enable farmers to hold their crop for a higher price. Fourteen million, seven hundred and fifty thousand dollars has been advanced as seed loan money and \$17,000,000 for cotton acreage plowed under. These vast payments have gone with cash income from crops and livestock into retail purchases. A group of selected grocery stores reported March business 21.15% ahead of last March and representative drug stores reported gains of from 10% to 35% with the average about 20%. Moving picture attendance is up 27.5%. Ford and Chevrolet dealers report gains of from 35% to 40%; Buick and Nash dealers are 37% to 62% better, and Lincoln and Cadillac dealers report increases of 25% to 35%.

The Plough Chemical Company is employing 550 workers at present. This is an increase of 45% in employment over last year and an increase of 175% in payroll. Building permits are 36% higher in dollar value than last year. Railroads in the Memphis division announced last month that they will reemploy

some 1,500 men immediately and will spend large sums for equipment, repairs and maintenance. The upturn in building activities has cut the number of unemployed construction workers down to the lowest figure since the depression began.

Nashville, Tenn.

	City	Retail Area
Population	153,866	856,074
% U. S. A. ....	.125	.697
Retail Outlets	1,843	7,664
% U. S. A. ....	.118	.495
Income Tax Returns	5,881	8,198
% U. S. A. ....	.173	.242
Bank Debits (Jan.-Feb.)	increased	9.3%
Department Store Sales (Feb.)	increased	24.7%
Factory Employment (Feb.)	increased	26.0%

Counties in area and % increase in new passenger car sales, '33 over '32—TENNESSEE: Bedford, 80.6; Benton, 26.7; Cannon, -8.3; Cheatham, 84.6; Clay, 100.0; Coffee, 42.6; Cumberland, 130.0; Davidson, 62.3; De Kalb, 21.4; Dickson, 69.6; Fentress, 57.1; Giles, 90.1; Hickman, 81.0; Houston, 44.4; Humphreys, 178.6; Jackson, 75.0; Lawrence, 214.0; Lewis, 266.6; Lincoln, 127.5; Macon, -25.0; Marshall, 144.7; Maury, 152.8; Montgomery, 134.2; Moore, .0; Overton, 10.3; Perry, 10.0; Pickett, 250.0; Putnam, 23.9; Robertson, 120.2; Rutherford, 79.6; Smith, 226.7; Stewart, -32.0; Sumner, 96.7; Trousdale, 45.4; Warren, 71.1; Wayne, 75.0; White, 96.6; Williamson, 106.7; Wilson, 98.7.

Current Business Situation

Nashville industries report big increases in employment. The P & B Manufacturing Company is now employing 700 workers, a gain of 150% over last year. The May Hosiery Mills has 405 employees, a 75% gain; the A. L. Kornman Company 310 employees, a 100% gain.

The Ross investigators found that most grocery outlets had 10% to 20% better business in March, with one-fifth of the outlets reporting business about the same. Four-fifths of the drug dealers called on showed increases ranging from 25% to 50%, with the others reporting business the same or declines of from 1% to 5%. Department store business in March showed a gain of 25% for the Cain-Sloan Company and 20% for the Castner-Knott Company.

Automobile sales in March showed extraordinary increases, such as the Jim Reid Chevrolet Company, 1,000%; Hippodrome Motor Company, 400%; Cadillac, 350%; Nashville Motor Company, 70%; Imperial Motor Car Company, 600%.

Dallas, Tex.

	City	Retail Area
Population	260,475	1,156,281
% U. S. A. ....	.212	.942
Retail Outlets	3,445	12,570
% U. S. A. ....	.222	.811
Income Tax Returns	14,596	22,091
% U. S. A. ....	.430	.651
Bank Debits (Jan.-Feb.)	increased	33.9%
Department Store Sales (Feb.)	increased	43.3%
Factory Employment (Feb.)	increased	17.8%
Factory Payrolls (Feb.)	increased	25.0%

Counties in area and % increase in new passenger car sales, '33 over '32—TEXAS: Camp, 20.0; Cass, 71.1; Collin, 135.5; Dallas, 47.1; Delta, -2.5; Ellis, 129.7; Fannin, 54.9; Franklin, -14.3; Grayson, 69.8; Gregg, 11.5; Harrison, 46.7; Henderson, 80.2; Hopkins, 73.7; Hunt, 73.7; Kaufman, 151.5; Lamar, 72.6; Marion, 64.3; Morris, 78.0; Navarro, 50.9; Panola, 98.4; Rains, 37.5; Red River, 29.1; Rockwall, 53.8; Smith, 12.3; Titus, 45.6; Upshur, -7.7; Van Zandt, 15.2; Wood, 61.5.

Current Business Conditions

Employment and payrolls in the Dallas district are now at the highest levels since the Summer of 1931. According to the Bureau of Business Research of the University of Texas, February employment was 17.8% over the preceding year, and payrolls are reliably estimated as being at least 25% greater.

Detailed figures of increased agricultural income are not available, but the Federal Government estimate shows that the current increase in the entire State of Texas is 52%.

During March, Dallas set one record which makes it unique

among American cities—here bank deposits reached a new high level which surpassed even the figures for 1928-1929.

According to a check-up made by the Ross investigator, typical grocery stores increased their business from 10 to 20% in March. This included not only independents, but such chains as Safeway, A & P and Piggly-Wiggly.

All of the drug stores which were checked show increases ranging from a minimum of 4% to a maximum of 35%.

Leading department stores such as Sanger Brothers and W. A. Green report big increases for the first quarter. The average February increase for the five leading department stores was 43.3%.

Three motion picture theatres checked by Ross—the Texas, Capitol and Old Mill—showed increases ranging from 14 to 20%.

Automotive sales are booming. The downtown branch of the City Chevrolet Company reports a 75% increase, as does the Chevrolet agency of John E. Morris; Dallas Motors, Inc. (Pontiac) are 50% ahead; The Perry Motor Company (Dodge) reports a 200% increase, and the Cadillac-LaSalle distributor finds business 50% better.

The most recent figures on building contracts awarded showed a 200% increase, according to the City Building Inspector.

El Paso, Texas

	City	Retail Area
Population	102,421	347,647
% U. S. A. ....	.083	.283
Retail Outlets	1,308	3,991
% U. S. A. ....	.084	.258
Income Tax Returns.....	3,315	7,045
% U. S. A. ....	.098	.208

Counties in area and % increase in new passenger car sales, '33 over '32—TEXAS: Brewster, 32.4; Culberson, 55.0; El Paso, 45.0; Hudspeth, 50.0; Jeff Davis, 12.5; Pecos, 52.3; Presidio, 87.5; Reeves, 88.8; Terrell, 210.0. ARIZONA: Cochise, 80.3; Greenlee, 183.3. NEW MEXICO: Catron, 100.0; Chavez, 40.6; Dona Ana, 85.4; Eddy, 95.3; Grant, 16.3; Hidalgo, 42.1; Lea, 57.3; Lincoln, 39.5; Luna, 135.7; Otero, 113.5; Sierra, 38.1.

Fort Worth, Tex.

	City	Retail Area
Population	163,447	1,190,328
% U. S. A. ....	.133	.970
Retail Outlets	1,981	15,096
% U. S. A. ....	.128	.974
Income Tax Returns.....	5,665	14,875
% U. S. A. ....	.167	.438
Bank Debits (Jan.-Feb.).....	increased	31.9%
Department Store Sales (Feb.).....	increased	26.5%
Factory Employment (Jan.).....	increased	25.0%
Factory Payrolls (Jan.).....	increased	20.0%

Counties in area and % increase in new passenger car sales, '33 over '32—TEXAS: Andrews, -25.0; Bailey, 725.0; Borden, 200.0; Briscoe 588.9; Brown, 108.5; Callahan, 85.3; Castro, 380.0; Childress, 248.6; Cochran, 14.3; Coke, 55.6; Coleman, 151.4; Collingsworth, 132.3; Comanche, 92.0; Concho, 151.6; Cooke, 94.4; Cottle, 378.8; Crane, 186.1; Crockett, 300.0; Crosby, 600.0; Dawson, 131.4; Denton, 54.5; Dickens, 279.5; Donley, 54.2; Eastland, 76.6; Ector, 65.2; Erath, 85.1; Fisher, 334.9; Floyd, 243.3; Foard, 308.3; Gaines, 57.1; Garza, 393.1; Glasscock, 166.7; Hale, 222.2; Hall, 234.8; Hamilton, 236.6; Haskell, 293.2; Hemphill, 30.2; Hockley, 282.3; Hood, -5.6; Howard, 123.8; Irion, 146.2; Jack, 33.3; Johnson, 97.0; Jones, 255.0; Kent, 800.0; King, 77.8; Knox, 72.6; Lamb, 366.1; Lampasas, 164.3; Loving, 142.9; Lubbock, 251.1; Lynn, 576.7; McCulloch, 198.3; Martin, 71.4; Menard, 146.7; Midland, 148.2; Mitchell, 109.7; Montague, 47.3; Motley, 556.2; Nolan, 141.6; Palo Pinto, 56.4; Parker, 67.0; Reagan, 34.7; Runnels, 197.9; San Saba, 43.6; Schleicher, 126.6; Scurry, 345.0; Shackelford, 42.9; Somervell, -33.3; Stephens, 180.4; Sterling, 740.0; Stonewall, 238.1; Sutton, 438.5; Tarrant, 58.7; Taylor, 97.4; Terry, 141.0; Throckmorton, 108.0; Tom Green, 118.6; Upton, 155.6; Ward, 119.2; Wheeler, 142.7; Winkler, 200.0; Wise, 49.2; Yoakum, -300.0.

Current Business Conditions

Purchasing power in the Fort Worth area is approximately 25% better than at this time last year, with the gain uniform in urban and rural areas. That the increased earnings are going into circulation is proved by the check-up made by Ross investigators among automobile dealers and motion picture exhibitors.

Out of four important theatres checked, the one with the poorest showing had an increase of 22%, the highest, 30%.

Business of the C. Kraft Motor Company is 100% better; Allen Motor Company, 90%; Webb-Kent, 150%; Mitchell, 175%; Worth, 100%; Peerless Sales, 100%.

All of the food and drug outlets visited by the Ross investigator reported increases over last year, and the same was true of department stores, with Leonard Brothers showing a current increase of 12% and Monig's 15%.

According to an investigation made by the Bureau of Business Research of the University of Texas, business has become progressively better in the Fort Worth area since the first of the year, and, in contrast to a usual decline, February retail sales exceeded by 1.7% those of January.

Building permits for the 1933 full year exceeded those of 1932 by 90%; deposits in Fort Worth banks at the end of the year showed a gain of 15% over the preceding year; Post Office receipts were equal to 1932, despite a drop in the local rate, and gains were recorded in the number of electric light and water meters in operation.

The March advertising lineage of the Fort Worth *Star-Telegram* was 55% greater than the same month last year, and for the five months' period ending March 1 that newspaper gained 17,316 in daily circulation, and 11,325 Sunday.

Houston, Tex.

	City	Retail Area
Population	292,352	581,220
% U. S. A. ....	.238	.473
Retail Outlets	3,825	14,064
% U. S. A. ....	.247	.908
Income Tax Returns.....	14,260	25,703
% U. S. A. ....	.420	.759
Bank Debits (Jan.-Feb.).....	increased	16.3%
Department Store Sales (Feb.).....	increased	36.4%
Payrolls (March)	increased	15.0%

Counties in area and % increase in new passenger car sales, '33 over '32—TEXAS: Anderson, 149.7; Angelina, 101.3; Aransas, -33.3; Austin, 103.4; Bastrop, 128.2; Brazoria, 11.5; Brazos, 61.5; Burleson, 89.7; Calhoun, 100.0; Chambers, 3.2; Cherokee, 86.7; Colorado, 149.1; Fayette, 90.7; Fort Bend, 105.6; Freestone, 115.2; Galveston, 49.2; Goliad, 46.7; Grimes, 165.6; Harris, 97.5; Houston, 62.8; Jackson, 91.1; Lavaca, 112.5; Lee, 121.7; Leon, 69.4; Liberty, 84.7; Limestone, 77.1; Madison, 133.3; Matagorda, 69.4; Milam, 76.0; Montgomery, 206.1; Nacogdoches, 75.3; Polk, 160.6; Refugio, 110.3; Robertson, 91.7; Rusk, 23.0; San Augustine, 128.2; San Jacinto, 157.8; Shelby, 40.4; Trinity, 168.4; Tyler, 208.6; Victoria, 88.3; Walker, 19.8; Waller, 150.0; Washington, 145.5; Wharton, 82.6.

Current Business Conditions

Distributors in the Houston area report that the middle classes are now beginning really to spend money. Last year even those who had money were afraid to spend it. Now they feel that their positions are secure and that they can afford to buy the things which they have been wanting for the past few years.

The Automatic Sales Corporation, for example, distributors of Norge refrigerators and RCA-Victor radios, state that their March business was larger than any month during 1933—and a gain of 400% over last March. The Crumacker Distributing Company (Philco) report a 102% increase for the first three months of this year, with two-thirds of their total business replacement business.

The Southwestern Drug Corporation had a 45% increase in March over last year, and a 50% increase during the first quarter.

J. M. Taub & Sons, wholesale tobacco, reports, through Mr. Ben Taub, president, "My business for the first three months of this year is 20% better than for the first quarter of last year, and I am looking for even better business during the coming month."

The Hughes Tool Company is employing 1,564 people—a 32% increase over last year in numbers, and 64% in payrolls; 359 men are employed by Cyrus W. Scott—a gain of 12.5% in numbers, and 47.9% in payrolls; 2,845 are employed by Southern Pacific—a decrease of 5% in numbers and 14% in payrolls.

Typical food outlets as surveyed by the Ross investigators showed that about a third of them reported business equal to last year, while the others reported increases ranging from 15 to 25%.

Typical drug stores reported business ranging from equal to last year to 22% ahead.

Department stores in February increased their business 36.4%. Motion picture attendance increases range from 20% at Loew's State to 40% at the Ritz, a third-run house.

The Raymond Pearson Automobile Agency (Ford cars and trucks) reported a 358% increase for March, and 270% gain for the first quarter; Hickman-Garrett, a 50% gain; the Earl North Buick Company (and Oldsmobile) jumped its business 287% last month; Cadillac-LaSalle, 33 1/3%.

San Antonio, Tex.

	City	Retail Area
Population	231,542	773,572
% U. S. A. ....	.189	.630
Retail Outlets	3,315	11,550
% U. S. A. ....	.214	.746
Income Tax Returns	7,688	16,543
% U. S. A. ....	.227	.487
Bank Debits (Jan.-Feb.)	increased	11.0%
Department Store Sales (Feb.)	increased	25.1%
Payrolls (Mar.)	increased	20.0%

Counties in area and % increase in new passenger car sales, '33 over '32—TEXAS: Atascosa, 89.1; Bandera, 87.5; Bee, 86.3; Bexar, 31.5; Blanco, 142.0; Brooks, 94.4; Caldwell, 157.3; Cameron, 81.9; Comal, 84.3; DeWitt, 60.6; Dimmit, -15.6; Duval, 60.7; Edwards, 212.5; Frio, 55.6; Gillespie, 31.9; Gonzales, 151.9; Guadalupe, 59.8; Hidalgo, 33.3; Jim Hogg, 72.0; Jim Wells, 97.0; Karnes, 355.1; Kendall, 143.6; Kenedy, 33.3; Kerr, 28.7; Kimble, 152.5; Kinney, 90.3; Kleberg, 105.8; La Salle, 63.6; Live Oak, 178.3; Llano, 32.4; McMullen, 400.0; Mason, 230.8; Maverick, 27.5; Medina, 82.9; Nueces, 169.5; Real, 350.0; San Patricio, 188.0; Starr, -15.0; Uvalde, 80.7; Val Verde, 144.6; Webb, 10.4; Willacy, 195.0; Wilson, 72.7; Zapata, -28.6; Zavala, -34.9.

Current Business Conditions

The Ross investigator reports that a quarterly survey of the Chamber of Commerce, just completed, shows the following improvements in important industries: Radio, 35%; drugs, 30%; grocery, 10%; automobile, 40%; wholesale dry goods, 33%; machinery and building materials, 75%.

A group of grocery store proprietors interviewed by the Ross investigator all reported increases, with the range running from 2 to 20%, and druggists, including both independents and chains such as Walgreen, showed increases of from 3 to 12%.

Increased attendance at motion picture theatres ranges from a minimum of 15% in one large theatre to 250% in another.

Sales in such important department stores as Wolff & Marks and Vogue, show increases of 25 to 35%.

The Western Union Telegraph Company increased its business 24% in March this year over last year, and the San Antonio branches are employing 235 workers—an increase of 18% in numbers and 15% in payrolls. The 224 employees at the Wolff & Marks store represent an increase of 20% in numbers and 19% in payrolls.

Sales of San Antonio jobbers for the first quarter of 1934 show increases over the total sales volume for the first quarter of 1933 and approximately the following ratios: Radios and electric refrigerators, 35%; heavy materials, 75% to 100%; drugs, 30%; groceries, 10%; candy, tobacco, etc., 50%; automobiles, 40%; dry goods, 33 1/4%.

The large increase in the sale of heavy materials can be attributed directly to the large amount of government projects in this area. It is naturally to be expected that the grocery sales have increased less than other items since this is a necessity. It is believed that the 35% to 40% increase in sales of radios, electric refrigerators and automobiles is the best indication of improved business conditions during the first quarter of 1934 as compared to the first quarter of 1933.

All of these items are non-essentials and the purchases of same are definite proof that purchasing power and public confidence are being rapidly restored.

Salt Lake City, Utah

	City	Retail Area
Population	140,267	739,873
% U. S. A. ....	.114	.603
Retail Outlets	1,546	7,655
% U. S. A. ....	.100	.494
Income Tax Returns	5,591	13,164
% U. S. A. ....	.165	.388
Bank Debits (Jan.-Feb.)	increased	12.0%
Department Store Sales (Jan.)	increased	33.1%

Counties in area and % increase in new passenger car sales, '33 over '32—UTAH: Beaver, 42.9; Box Elder, 74.6; Cache, 46.9; Carbon, 81.9; Davis, 34.5; Duchesne, 125.0; Emery, 18.8; Garfield, 120.0; Iron, 177.8; Juab, 171.4; Kane, 400.0; Millard, 122.7; Morgan, 17.9; Pinto, 25.0; Rich, 1,000.0; Salt Lake, 70.6; Sanpete, 179.0; Sevier, 110.5; Summit, 50.0; Tooele, 97.1; Utah, 74.3; Wasatch, 50.0; Washington, 79.0; Wayne, 50.0; Weber, 65.1. NEVADA: Elko, -27.7; Lincoln, 11.5; White Pine, 67.9; WYOMING: Lincoln, 44.3; Uinta, 34.9. IDAHO: Bannock, 93.5; Bear Lake, 26.3; Bingham, 113.3; Bonnerville, 216.4; Butte, 100.0;

Caribou, 300.0; Cassia, 139.5; Clark, 33.3; Custer, 100.0; Franklin, -2.2; Fremont, 48.0; Jefferson, 200.0; Jerome, 600.0; Lemhi, 56.2; Lincoln, 12.0; Madison, 64.1; Minidoka, 55.3; Oneida, 118.2; Power, 50.0; Teton, 283.3; Twin Falls, 80.3.

Current Business Conditions

The Chamber of Commerce states "According to the U. S. Government survey of Manufacturers in 1931, which is the latest official census, there were 4,154 wage earners in Salt Lake City receiving \$5,224,409 in wages; for Utah, 10,762 wage earners, and \$12,510,951 distributed in wages.

"It is estimated that there is an approximate increase of 25% over these figures for this period; however, the official count will not be available until late in the year."

Richmond, Va.

	City	Retail Area
Population	182,929	454,325
% U. S. A. ....	.149	.370
Retail Outlets	2,558	4,406
% U. S. A. ....	.111	.284
Income Tax Returns	8,898	12,922
% U. S. A. ....	.262	.381
Bank Debit (Jan.-Feb.)	increased	2.5%
Department Store Sales (Mar.)	increased	56.5%
Factory Employment (Feb.)	increased	16.9%
Factory Payrolls (Feb.)	increased	23.4%

Counties in area and % increase in new passenger car sales, '33 over '32—VIRGINIA: Albemarle, -10.5; Amelia, -13.6; Brunswick, 56.0; Buckingham, .0; Caroline, 19.1; Charles City, -4.5; Charlotte, 18.6; Chesterfield, 13.8; Cumberland, -23.8; Dinwiddie, 22.8; Fluvanna, 5.3; Gloucester, 9.1; Goochland, 4.4; Greene, -21.6; Greensville, 51.1; Hanover, 3.4; Henrico, 13.1; James City, -13.7; King & Queen, -23.1; King William, -12.5; Louisa, -5.7; Lunenburg, 77.8; Mathews, -2.9; Mecklenburg, 20.5; Middlesex, -34.4; New Kent, 12.9; Northampton, 50.4; Nottaway, 1.9; Orange, 4.5; Powhatan, 31.4; Prince Edward, 13.8; Prince George, 34.9; Surry, 61.1; Sussex, 12.3; York, -22.5.

Current Business Situation

March employment in the six largest companies, including the American Tobacco Company, was 27.8% better than last year, and payrolls were up 46.1%.

The increased purchasing power is reflected in all forms of retail sales. Four typical dealers in low-priced cars increased an average of 96%; three dealers in medium-priced cars increased an average of 120%, including a 300% increase by the leading Dodge dealer. Leading department stores report such increases as 72% for Kaufman's and 60% for Thalheimer's. Ten typical drug stores report business up 14%.

Distributors of radios and washing machines report business up about 9%, while a group of drug and grocery jobbers show an average increase of 37%. For the month of February the value of building permits increased 93.5% over last year; Customs receipts were up 25%; the State Agricultural Department reports an average increase of 30% in agricultural incomes, and the Chamber of Commerce estimates that the total of all payrolls (factory, stores, service industries, etc.) is up 25%. Internal revenue collections in February jumped 31.4%.

Seattle, Wash.

	City	Retail Area
Population	365,583	1,148,096
% U. S. A. ....	.298	.935
Retail Outlets	5,625	16,477
% U. S. A. ....	.363	1.064
Income Tax Returns	20,685	36,857
% U. S. A. ....	.609	1.086
Bank Debits (Jan.-Feb.)	increased	25.2%
Department Store Sales (Feb.)	increased	28.2%
Payrolls (March)	increased	27.5%

Counties in area and % increase in new passenger car sales, '33 over '32—WASHINGTON: Benton, 28.1; Chelan, 66.1; Clallam, 60.0; Grays Harbor, 188.0; Island, 26.7; Jefferson, -9.8; King, 45.0; Kitsap, 3.6; Kittitas, -11.6; Lewis, 58.4; Mason, 41.4; Pierce, 39.5; San Juan, 70.0; Skagit, 68.6; Snohomish, 50.9; Thurston, 88.7; Whatcom, 52.5; Yakima, 75.0.

Current Business Conditions

The Industrial Department of the Chamber of Commerce estimates that total payrolls in March were approximately 27.5%

ahead of last year, and the State Development Department of the same organization estimates that agricultural income in the Seattle area in 1933 was 80% over 1932, and that 1934 will show a further gain of at least 10%.

The Ross investigators found that retail food outlets' sales in March ranged from no change to gains of 10%, and that drug stores averaged about 8% better, with the range running from no change to gains of 25%.

Department store sales since the first of the year have ranged from 20% to 30% higher than last year.

Distributors of Plymouths, Fords, Studebakers, Packard and Pierce-Arrow cars, reported March gains in excess of 100%. January and February sales of all automobile dealers averaged 33% higher than last year.

The leading industry in the Seattle area is lumber, and at the present time orders are 35% ahead of a year ago, largely due to PWA orders. The industry as a whole is employing 40% more men than prior to the adoption of the NRA code, and payrolls are approximately 50% higher. Production in March was 50% ahead of last year.

Building permits in the City of Seattle are running 30% ahead of last year, but are still low.

In the tributary area, Tacoma and Everett report current retail sales increases of 17%.

Spokane, Wash.

	City	Retail Area
Population	115,514	472,992
% U. S. A.....	.094	.385
Retail Outlets	1,696	6,232
% U. S. A.....	.109	.402
Income Tax Returns.....	4,909	10,647
% U. S. A.....	.145	.314
Bank Debits (Jan.-Feb.).....increased	15.3%	
Department Store Sales (Feb.).....increased	37.9%	

Counties in area and % increase in new passenger car sales, '33 over '32—WASHINGTON: Adams, 121.1; Asotin, -23.4; Columbia, 118.7; Douglas, 96.0; Ferry, 18.2; Franklin, 34.8; Garfield, 6.1; Grant, 29.4; Lincoln, 68.6; Oskanogan, 49.0; Pend Oreille, -40.7; Spokane, 35.0; Stevens, -8.7; Walla Walla, 19.0; Whitman, 45.6. IDAHO: Benewah, 84.6; Bonner, -18.9; Boundary, 52.6; Clearwater, 11.5; Idaho, -31.9; Kootenai, 2.4; Latah, 25.0; Lewis, 5.9; Nez Perce, 67.5; Shoshone, 75.2; MONTANA: Flathead, 30.7; Lake, 28.6; Lincoln, 8.3; Sanders, 131.3.

Current Business Conditions

Retail and wholesale sales increases make the Spokane retail area stand out as one of the country's leading bright spots. Although official March figures are not available, a late survey among 25 local representative firms, in all lines, indicates that March sales were far above January and February, and from 30% to 100% above last March.

For example, a group of 14 food stores surveyed by Ross showed gains ranging from 15% to 40%, while drug stores, including both independents and the Owl chain, showed increases ranging from 25% to 75%. The Crescent Department Store reports a 94% increase in March. For several months the percentage gain of Spokane department stores exceeded those of any other city in the eleven Western States—January, 40%; February, 33.6%.

The Universal Auto Company (Ford) had a 265% March increase; Studebaker, 450%; the Eldridge Motors (Buick), 400%, and the Lincoln and Cadillac agencies, each 100%; Riegel Brothers, agents for Dodge and Plymouth cars, sold more Dodge trucks in February than in all of 1933—even though 1933 business was 200% better than 1932.

Wholesale distributors report equally startling gains—the Frigidaire business for the first quarter was 400% better than last year; Maytag Washer, 45% better; Kelvinator, 400% better; a leading cigar and tobacco wholesaler, 10% better.

The Home Telephone Company gained 187 phones in the city during March—the largest gain for any month for the last two years. For eight successive months gains have been recorded over any preceding months.

For the first quarter of the year, 313 building permits, amounting to \$280,775, were issued, as compared with 194 permits, valued at \$112,769, for the same 1933 period. Currently there is greater building activity than at any time since 1931.

Bank clearings gained 32% in February.

Post Office receipts for the first quarter were 10% ahead of 1933.

Wheeling, W. Va.

	City	Retail Area
Population	61,659	266,409
% U. S. A.....	.050	.217
Retail Outlets	990	3,274
% U. S. A.....	.064	.211
Income Tax Returns.....	3,313	5,290
% U. S. A.....	.098	.156

Counties in area and % increase in new passenger car sales, '33 over '32—WEST VIRGINIA: Brooke, 145.1; Marshall, 28.7; Ohio, 67.2; Tyler, 60.9; Wetzel, 1.1. OHIO: Belmont, 59.1.

Charleston, W. Va.

	City	Retail Area
Population	60,408	642,477
% U. S. A.....	.049	.523
Retail Outlets	886	5,742
% U. S. A.....	.057	.371
Income Tax Returns.....	3,124	8,246
% U. S. A.....	.092	.243

Counties in area and % increase in new passenger car sales, '33 over '32—WEST VIRGINIA: Boone, 70.9; Clay, -2.2; Fayette, 36.8; Greenbrier, 19.7; Kanawha, 41.9; McDowell, 72.6; Mercer, 35.8; Monroe, -4.9; Putnam, -6.4; Raleigh, 73.3; Summers, 45.7; Wyoming, 96.2. VIRGINIA: Buchanan, 36.3; Tazewell, 6.0.

Milwaukee, Wis.

	City	Retail Area
Population	578,249	1,865,014
% U. S. A.....	.471	1.527
Retail Outlets	8,669	25,373
% U. S. A.....	.560	1.638
Income Tax Returns.....	34,042	65,734
% U. S. A.....	1.003	1.937
Bank Debits (Jan.-Feb.).....increased	3.0%	
Department Store Sales (Feb.).....increased	26.4%	
Factory Employment (Jan.).....increased	42.4%	
Factory Payrolls (Jan.).....increased	44.4%	

Counties in area and % increase in new passenger car sales, '33 over '32—WISCONSIN: Adams, -24.5; Calumet, 39.8; Chipewewa, 8.1; Clark, 2.2; Columbia, 19.6; Dodge, 6.6; Florence, 37.5; Fond du Lac, 1.3; Forest, -7.8; Green Lake, -33.6; Jackson, -38.7; Jefferson, -10.0; Juneau, -16.2; Langlade, 12.1; Lincoln, -5.3; Manitowoc, 33.0; Marathon, -7.5; Marquette, -3.7; Milwaukee, 31.0; Monroe, -5.8; Onedia, -5.3; Outagamie, 40.0; Ozaukee, 11.5; Portage, 0.4; Racine, -6.6; Shawano, 23.8; Sheboygan, 17.9; Taylor, 17.2; Vilas, 6.6; Washington, 35.9; Waukesha, 15.9; Waupaca, -22.4; Waushara, -19.2; Winnebago, 18.6; Wood, 9.3.

Current Business Conditions

Wisconsin Industrial Commission estimates that total payrolls (factory, stores, etc.) were 55.4% better this March than last. Considerable labor unrest in Milwaukee and tributary cities during March cut into factory employment and payrolls as compared with January and February, but there is no reason to believe that this will be permanent.

Eight plants in the automotive industry were employing 7,544 men in March—a gain of 5.9% in number, but 60.4% in payrolls.

Thirteen manufacturers of boots and shoes were employing 5,676 workers—an increase of 3.5% in employees and 13.2% in payrolls.

Fifty-two foundries and machine shops were employing 4,853 men—a decline of 22% in number and 4.2% in payrolls.

According to figures of the Wisconsin Labor Commission, building contracts for the first half of March were down 10% from last year.

A group of selected grocery stores had an average increase for the first half of March over last year of 16.5%.

Retail druggists reported average gains of 12%.

Sears, Roebuck stores' business was up about 75% and Gimbel Brothers, 30%.

The average March attendance in moving picture theatres in widely scattered sections of the area was nearly 25% over last year.

Increases among automobile dealers included 20% for the Merkle Chevrolet; 30% for Ford Motor Company; 15% for Barther Nash Company; 30% for North Shore Buick Company; and 10% for Packard Motor Company.

Washington, D. C.

	City	Retail Area
Population	486,869	780,964
% U. S. A. ....	.397	.636
Retail Outlets	5,931	8,441
% U. S. A. ....	.383	.545
Income Tax Returns.....	52,631	60,973
% U. S. A.	1.551	1.796
Bank Debits (Jan.-Feb.).....	decreased 16.7%	
Department Store Sales (Jan.-Feb.) increased	8.4%	
Factory Employment (Feb.).....	decreased 9.6%	
Factory Payrolls (Feb.).....	decreased 1.2%	

Counties in area and % increase in new passenger car sales, '33 over '32—MARYLAND: Charles, -20.8; Montgomery, 21.9; Prince George, -5.0. VIRGINIA: Arlington, -27.8; Culpeper, 10.0; Fairfax, -33.8; Fauquier, -10.4; King George, -5.3; Loudoun, -12.4; Madison, -15.2; Prince William, -20.5; Rappahannock, -9.1; Spotsylvania, 12.8; Stafford, -5.4; Westmoreland, 3.2. DISTRICT OF COLUMBIA: Washington, 8.4.

Current Business Situation

Ordinary statistical indices do not tell the true story about Washington, because it is less dependent on industrial production than any other major city.

There have been salary reductions in the Federal payrolls and wholesale firings—while at the same time the multiplication of new bureaus and departments has added thousands of new workers. Growing numbers of officials in public life are making the city their permanent home and thousands of people who draw

their income from other parts of the country spend it in Washington. The recent pay increase granted to Federal employees will add \$2,000,000 monthly to Washington incomes.

It is the largest white-collar city in America, and a city with the highest standards of living. During the year, since March 1, 1933, every seventh white family purchased a new car; every eighth family owns an electric refrigerator, and an oil burner is in every thirteenth white family home.

Retail grocers' business increased 20% this March over last, while retail drug business was up 11.7% in a group of typical stores. The four largest department stores have an average increase of 40%, with one reporting a gain of 45%. Motion picture theatres are 13% better off, despite reduced prices. Ford, Plymouth and Chevrolet business dealers report business 117% better, while Buick, Nash and Chrysler distributors have an average increase of 107%. Lincoln, Pierce-Arrow and Packard dealers report a 15.3% gain. Distributors of radios and washing machines point to a 50% increase, while the drug jobbers average a 15.5% gain. Building contracts awarded in the first fifteen days of March increased 11% over last year. The surrounding suburban cities enjoy the same measure of continued prosperity, due to the fact that so many government workers live in these cities.

Bank clearings in March were not only far ahead of the same month last year, but exceeded the totals for this January and February.

Deposits in Washington banks from December 30, 1933, to March 5, 1934, increased \$23,417,000, and, with the restoration of government pay, it is predicted that further advances will be made in all classes of bank deposits.

The number of Federal workers shows an increase. The total number of workers employed in government departments is now 79,913, of whom only 8,290 are listed as temporary.

Is Every One of Your Salesmen Fighting for Business?

Have you used *Sales Management's* Campaign for Stimulating Salesmen? It is exceedingly simple to operate, and increased activity of only one salesman will pay for the complete campaign. It consists of fourteen weekly mailings of special messages for salesmen, a sound, constructive letter to accompany each message. The cost of these special messages is only three cents per copy, and the entire fourteen special letters may be had for only \$1.50. Titles and descriptions of the messages follow:

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EVEN TY COBB HAD HIS "NO HIT" STREAKS

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YOU'RE THE DOCTOR

Drives home the idea of putting in a full day every day.

THE GREATEST SPORT IN THE WORLD

Dramatizing the competitive, "game" element in selling.

THE GOLDEN HOUR OF SELLING

For the salesman who is reluctant to begin his day's work.

WE NEED MORE SECOND-AND-THIRD-WIND MEN

On keeping a few clinching arguments in reserve.

THE LESSON OF THE DEAD LINE

Dramatizes the value of getting things done today.

IT'S THE NEXT SHOT THAT COUNTS

Emphasizes the necessity of a sustained drive in selling.

THE SNARE OF COMPETITIVE PRICES

A common-sense discussion of the error of cutting prices.

DIAMONDS IN YOUR OWN BACK YARD

For the salesman who isn't concentrating his efforts.

SET YOUR OWN GOAL

Stimulates the salesman to better his past sales records.

TILL THE UNTILLED PLACES

For the man who isn't digging for new business.

ONE FALTERING OARSMAN CAN LOSE A RACE

Drives home the necessity of teamwork in a sales force.

THEY CALLED HIM "THE BUTCHER"

On searching for untapped sources of new business.

In ordering, simply tell us which messages you desire and enclose your remittance. The cost is three cents per copy of each message ordered. If you want the special letters, just add \$1.50 to your remittance.

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Washington, (D. C.)

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**Seat of the biggest business in the world...the Federal Government...Most national as a cross-section of America
Washington should be on every 1934 sales program**

MARKET planning is reduced to its simplest terms in Washington, the nation's market. Here sales executives have one of the most condensed unit areas in the country, with highest buying power, lowest selling costs, and a sales potential surpassing any market of comparable size.

The convincing story told by the cold figures in Sales Management's Market Planning Number shows today, as for years past, the high standards of this market in terms of:

POPULATION—a city market larger than eight states in the U. S.—a retail trading area of 750,000, larger than 13 states.

SPENDABLE MONEY INCOME—\$777.7 per capita, an increase of \$118.8 over the 1932 S.M.I. figure. This compares with \$414.9 per capita average for the U. S. In total volume, greater than that of 18 states.

INCOME TAX RETURNS—larger than those of 33 states.

RETAIL SALES—\$482.4 per capita, as compared with the U. S. per capita average of \$243.3. In total volume, greater than that of 17 states.

PASSENGER CAR SALES—ranging in volume greater than that of 17 states in the lowest price group, to that of 33 states in cars costing over \$1,250.00.

THERE is no problem in reaching and selling this key market. Wholesale and retail outlets are adequate—transportation costs are moderate—and the advertising job is easy and simple.

The Washington Star leads all newspapers in the U. S. and Canada in advertising lineage, in 1933 as in 1932. It carried more than three times the volume of advertising of the second Washington newspaper—and a total of 47% of the combined advertising of all five Washington newspapers. It dominates Washington and its 25-mile trading area, evening and Sunday, in proven *character* as well as *volume* of circulation.

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Reference List of Articles on Important Marketing Problems

(All references listed below are to SALES MANAGEMENT. While copies of all back issues are not available—especially those which contained the Ross Federal Surveys, copies of any article can be furnished in photostat at a cost of 25 cents a page.—The Editors.)

Salesmen's Compensation and Salesmen's Expenses

Van Raalte Cuts Melon as Employees Share in Rich Profits Slices 4/ 1/34

Lower Sales Costs and Happier Salesmen Under This Bonus Plan 3/15/34

By A. D. Brush, director of sales research and planning, Abbott Laboratories, North Chicago.

Our Depression Ended When We Put Fight Back into Our Men 3/ 1/34

As told to Lester B. Colby by A. D. Brush, director of sales research and planning, Abbott Laboratories, North Chicago.

Salesmen's Auto Allowances Show Upward Trend—Now Average 51½ Cents. 2/15/34

Depression Days Expense Accounts Still in Order, but Rising Prices are Forcing Some Adjustments Upwards 2/ 1/34

Why We Insist Upon a Written Contract With Our Salesmen 1/ 1/34

By L. J. Steffen, vice-president in charge of sales Hough Shade Corporation, Janesville, Wisc.

How Much Salary for Leadership 12/15/33

Axton-Fisher Tobacco Company.

How 13 Firms Head Off Split Commission Scraps. 12/ 1/33

A Retroactive Bonus Helps to Cut Turnover on the Sales Force 10/10/33

This Bonus-for-Cash Idea Jumped Cash Payments from 22% to 70% 10/10/33

Plymouth's Sales Chief Tells His Men How to Double Their Incomes 6/15/33

Why I'm 100 Per Cent Sold on Straight Commission. . 6/15/33

By Walter Drey, Walter Drey Organization, New York City.

"Wholesale" Hotel Rates Sought by National Employers' Group 6/15/33

Why Bristol-Myers' Men Stick 5/15/33

As told to Lawrence M. Hughes by Earl A. Means, vice-president in charge of sales, Bristol-

Myers Company, New York.

How We Found a Tip Top Sales Opportunity in a Rock Bottom Year 4/ 1/33

By Walter Drey, Walter Drey Organization, New York.

Autos Face New Competition in Scrip Books; Many Firms to Return Western Salesmen to Travel by Railroad 2/15/33

The Ross Federal Consumer and Dealer Market Surveys

What the Consumer Thinks of Advertising—A Low-down 4/10/34

Twelve Cosmetics: Brands 1,500 Women Buy—and What They Pay 4/ 1/34

The Consumer Goes to Market—with What and for What? 3/15/34

Brand Preferences and Sales Trends in Rural Markets. 3/ 1/34

Tomorrow's Market for Radios, Refrigerators, Clocks, Oil Burners and Air Conditioners 2/15/34

What Cars—Tires—Oils—Gas Will Lead the 1934 Sales Parade? 2/ 1/34

Leading Grocery Store Brands in 10 Major Markets 1/15/34

Leading Drug Store Brands in 15 Major Markets. . . . 1/ 1/34

Sales and Advertising Campaigns in Local Markets

Does it Really Take a Pile of Money to Break into New York? 3/15/34

Zone System of Market Expansion Swells Dr. Pepper Sales and Profits 3/ 1/34

As told to Philip Salisbury by W. V. Ballew, Sales Manager, Dr. Pepper Company, Dallas, Texas.

Boone Study Provides Analysis of Spirituous Liquor Market in U. S. 2/15/34

3,500 Outlets in New York in 5 Months for Malt-O-Egg 2/15/34

Develop Plan for Merchandising National Brands through Chains 2/15/34

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Polk's Consumer Survey Shows What New Yorkers Buy	1/15/34
\$1.05 for Newspaper Color Space Pulls Like \$1.72 for "B-and-W"	12/15/33
"Advertise, Merchandise, and Give the Trade a Square Deal"	12/15/33
<i>By Bruce Crowell.</i>	
Market-at-a-Time Plan, Aided by Newspapers, Builds Washoff Sales	11/15/33
Newspapers Help Win Drug Stores for New Banana Food Product	11/15/33
How We Test and Check Direct Mail and Newspaper Advertising	10/20/33
<i>By M. B. Salisbury, Executive Vice-President, Postal Life & Casualty Company, Kansas City, Mo.</i>	
Newspaper Drive Starts to Move Cranberry Crop—Profitably	10/ 1/33
50-50 Newspaper Advertising Doubles Palm Beach '33 Sales	8/15/33
Consumer Ballots Determine Copy Theme for Van Dyck	8/15/33
Hires Concentrates to Beat Beer; Coca-Cola Finds Going Tougher	8/ 1/33
Six Oil Giants Fail to Daunt Austin in Detroit Gasoline War	8/ 1/33
<i>By D. G. Baird.</i>	
Sales Campaigns and Special Sales Drives	
Insurance Companies Cooperate to Tell Public about Stability	3/15/34
To Spend Two Millions Advertising National Cotton Week in May	3/ 1/34
General Mills Starts Campaign to Bolster Sagging "Bread Line"	3/ 1/34
The Secret of Winning Big Store Promotions? "Ideas," says Lenthic... ..	2/15/34
Standard Brands Gets 1,500 Dealers on Its "Weekly Special" Bandwagon	2/ 1/34
Daylight to Midnight Sales Drive Spurs Men to Break Records	1/ 1/34
How ABC Percales Won School-Opening Tieups in 400 Department Stores ..	12/ 1/33
Taylor Finds Consumer Slant for Scientific Line; Sales Jump	8/15/33
<i>By R. S. McFadden</i>	
GE Sells 2,000 Carloads of Refrigerators in 60-Day "Man Hunt"	7/ 1/33

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- Sales Punch without Ethical Offense for Drug Products 5/ 1/33
By Lester B. Colby.
- B. & B. Give Dealers Year's Sales Plan; Stress Correct Display 4/ 1/33
By Lester B. Colby.
- How Imperial Induces Key Dealers to Feature Its Line of Candies 3/15/33
By Mandus E. Bridston.
- How Squibb "Weeks" Doubled Business for 3,000 Dealers 2/15/33
Based on an interview by A. R. Hahn with Clyde Eddy, Manager, Merchandising Department, E. R. Squibb & Sons, New York City.
- Price Maintenance and Price Policies
- Bristol - Myers Disciplines Price-Cutters with Refusal-to-Sell 3/15/34
- Merchandising Plan Scuttles Cut-Price Pirates for Russell 3/ 1/34
- New "Custom" Shirt Aims to Make Men Repeat Buyers 1/ 1/34
- Lastex Pulls Many Apparel Items Out of Price-Slashing Melee 1/ 1/34
Based on an interview by A. R. Hahn with Percy Adamson, president and Charles L. Cushing, advertising manager, Adamson Brothers Company, New York City.
- Lastex Ended Price Fights, Chicago Manufacturers Report 1/ 1/34
- "Advertise, Merchandise, and Give the Trade a Square Deal" 12/15/33
By Bruce Crowell.
- Pricing Goods to Protect Profit Under NRA Costs. 11/ 1/33
By Allen W. Rucker, president, The Eddy-Rucker-Nickels Company, Marketing Counsel, Cambridge, Mass.
- Pricing Goods to Protect Profit Under NRA Costs. 10/20/33
- What Any Industry Can Do to Rationalize Prices 9/ 1/33
As told to Herber Kerkow by R. O. Eastman, R. O.

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- Eastman & Company, New York City.
- Built-in Quality Wins Mass Sales: Wirecraft Snubs Price Cutters 8/ 1/33
- Does It Ever Pay to Sell at a Loss to Absorb Overhead 4/20/33
By William E. Curley, vice-president, Thompson & Lichtner Company, Boston.
- A. & P. Point-of-Sale Study Shows "Price-Casting" Increases Sales 4/ 1/33
- Three of Tire "Big 4" Reduce Lines in Plan to Stabilize Prices 4/ 1/33
- Hiring and Handling Salesmen
- How Squibb Encourages Well-Rounded Sales Effort by Salesmen 2/ 1/34
- Many Firms to Repeat World's Fair Contests for Salesmen in 1934 2/ 1/34
- Why Everybody Fights for Orders When GE Runs a Contest 12/15/33
- "New Deal" Drive Van-

- quishes Blues for McCaskey Men 12/ 1/33
- A Follow-through Plan for Training New Salesmen. 12/ 1/33
By Corning White, advertising and merchandising manager, Eskimo Pie Corporation, Brooklyn, N. Y.
- Our Experience With Aptitude Tests in Hiring Salesmen 11/15/33
By Joyce Oliver, Household Finance Corporation, Chicago.
- Does It Pay to Attempt to Train Seasoned Salesmen? 10/20/33
By Joyce Oliver, Household Finance Corporation, Chicago.
- Standard Brands Trains Route Men Through Film Program 10/20/33
- A "Big Offensive" Contest That Gets Salesmen to Double Up on Calls.... 10/10/33
- Five Simple Tests for Prospective Salesmen 10/10/33
- Work-Analysis Plan Cuts Waste Selling Time 10/10/33

SALES management

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